

# The CHANGES Programme:

Quarterly Report: January – March 2003

Annual Report: April 1, 2002 - March 31, 2003

The CHANGES  
PROGRAMME

## Basic Education and Policy Support (BEPS) Activity

CREATIVE ASSOCIATES INTERNATIONAL<sup>2</sup>

*In collaboration with*

CARE, THE GEORGE WASHINGTON UNIVERSITY, AND GROUNDWORK



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**The CHANGES Programme**

**Quarterly Report No. 8: January – March 2003**

**(Including 2002-2003 Annual Report)**

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## I. SUMMARY

The end of the January-March 2003 quarter saw the CHANGES programme reach the two-year mark of its operations and continue to push onward while consolidating existing gains.

The **Community Sensitization and Mobilization Campaign (CSMC)** in Southern Province (hereafter SP) continued to make good strides in the present reporting period. The research and verification was completed in Gwembe District and the training of ZCFs from that district was planned for completion in early April. In March, entry was made in Mazabuka District, the seventh district to participate in the CSMC, where the initial District Stakeholders' Meeting was held and the five research and verification schools and catchment areas were selected. District Stakeholders' Meetings were held in Kazungula, Kalomo, and Choma Districts to strengthen district-level support for the programme, and District Review Workshops were held in Choma and Livingstone Districts to further develop the capacity of the ZCFs (Zonal-level Community Facilitators) in those districts.

At the provincial level, a Provincial Stakeholders' Meeting was held in Livingstone in early March, attended by provincial-level stakeholders from the three participating line ministries (MOE, MOH, and MCDSS). The purpose of the full-day meeting was to review the goals and objectives of the CSMC, to assess progress, to identify and resolve challenges, and to collaboratively map out the way forward. This meeting, and all the previously described district meetings held during the quarter, served to sharpen the focus of the CSMC and to fine-tune the programme. Throughout the reporting period, monitoring of the programme in all participating districts was carried out by the CSMC team and line ministry colleagues.

Meanwhile, the **School Health and Nutrition (SHN)** component of the CHANGES programme continued to implement activities in its pilot phase in Eastern Province (hereafter EP) while expanding its sphere of operations beyond the original plan of three districts. A major activity undertaken during the present reporting period was the mass treatment of pupils from the second group of 20 intervention schools in the September 2002 survey with bilharzia infection rates of higher than 45%. Nine schools fell into this category and, in all, 3,555 pupils received deworming drugs and micronutrient supplements. Another major activity this quarter, which is an ongoing task, was the monitoring of all 40 intervention schools in Chadiza and Chipata Districts; of particular concern was ascertaining progress in those schools in following the Health Promoting Schools guidelines.

Due to the success of the SHN programme, there has been pressure in the past year to expand the programme at a more rapid pace than originally intended. To this end, a total of 115 head teachers, teachers, health workers, and district officers were trained in Mambwe and Lundazi Districts of EP to implement the SHN programme in 20 schools in each of the districts. This brings to 90 the number of schools in EP currently participating in the SHN programme. In the meantime, planning was completed to train the same type of personnel in April in Lusaka Province (four districts) and Central Province (six districts) as the MOE expands the SHN programme to those provinces, averaging 20 schools per district. This means that by the end of next quarter, a total of 290 schools in Zambia will be part of the SHN programme. As the quarter drew to a close, the SHN team in EP completed plans to conduct a mini survey of approximately 400 pupils to determine re-infection rates since the second survey was completed six months earlier. Also, the CHANGES programme worked closely with the MOE, MOH, and CBOH (Central Board of Health) to complete an application to the Schistosomiasis Control Initiative (SCI) for approximately \$5.5 million to be used for scaling

up the SHN programme throughout EP and SP by the year 2005. This advance planning will dovetail with the work that will be done next quarter in designing the CHANGES programme's 18-month extension.

As has been noted in previous Quarterly Reports, **HIV/AIDS** is a cross-cutting theme of the CHANGES programme and, as a result, few HIV/AIDS activities stand alone; instead, they are integrated with ongoing girls' education and SHN initiatives. Having said that, during the present quarter, in EP the SHN team conducted an HIV/AIDS awareness training for 29 teachers in Sinda and trained 35 community-based volunteers in psycho-social counseling techniques. Additionally, the CHANGES-funded assessment of the impact of HIV/AIDS on the education sector in Zambia, which is being conducted by SIAPAC (Social Impact Assessment and Policy Analysis Corporation) in close collaboration with the MOE, was formally launched and has achieved considerable progress in less than three months. A Steering Committee and Working Group were formed to guide the work, the methodology and design of the study were agreed upon, data collection is underway, and the training of field researchers was started.

The **Small Grants Mechanism**, another cross-cutting dimension of the programme, furthered the impressive gains it achieved last quarter, especially in Southern Province. During the present reporting period, 11 new grants were awarded in SP and two in EP for a total of 13 new grants; in all, 33 small grants have now been awarded by the CHANGES programme. An encouraging sign has been the gradual shift in the proposals submitted from activities focused on infrastructure (classroom rehabilitation, construction of latrines and teachers' accommodation) to activities centered on HIV/AIDS mitigation, health and nutrition, and girls' education. Since the small grants mechanism has now been functioning effectively for more than one year, increasing emphasis will be placed on documenting the positive effects of the small grants on the overall programme.

With regard to **Programme Administration**, the CSMC, in hiring a new Research Coordinator and Office Orderly, is now fully staffed after experiencing some staff turnover. Moreover, moving into a much larger programme office (while maintaining the Coordinator's office in the provincial MOE) has provided the CSMC team with much needed working space, especially when the field researchers are in Livingstone. With regard to the CHANGES programme extension, although it was reported in the previous Quarterly Report that the extension would be designed during the present reporting period, due to the political unrest in Iraq and a subsequent ban by USAID on international consultant travel, the start of the extension design process was postponed. However, during the present quarter, an Extension Advisory Committee was formed in the MOE, which agreed on the Statement of Work for the extension consultant team and also recruited the consultants. It is anticipated that the design work will begin in late April and will be completed a month later.

Finally, because the second programme year of CHANGES ended this quarter on 31 March 2003, a brief Annual Report is included in Part II of this report.

## II. ANNUAL REPORT (1 APRIL 2002 – 31 MARCH 2003)

On 31 March 2003, the CHANGES programme completed its second year of implementation. Achievements for the year are highlighted below. For cumulative totals on progress towards achieving quantifiable targets, see the indicator tables in Part III of this report.

The **Community Sensitization and Mobilization Campaign (CSMC)** achieved considerable gains during the year, particularly after the programme was refocused in March 2002 and some changes were made in staffing. The following are the highlights:

- A refresher course for the CSMC Field Researchers was conducted in the field while they were conducting research in Choma District.
- Research and verification were completed in Choma, Livingstone, Sinazongwe, and Gwembe Districts, encompassing 20 school catchment areas (approximately 120 villages). Two drama performances were conducted in each catchment area to verify the research.
- 136 ZCFs (Zonal-level Community Facilitators) from Kazungula, Kalomo, Choma, Livingstone, and Sinazongwe Districts were trained to sensitize and mobilize communities on issues relating to girls' education and HIV/AIDS.
- Although the data are incomplete (not all figures from Livingstone and Sinazongwe Districts have been tabulated), the following was achieved last year:
  - 367 schools were sensitized from Choma, Kazungula, Kalomo, Livingstone and Sinazongwe Districts.
  - 1,290 communities were sensitized (from the same districts).
  - 242 community action plans were developed from Choma, Kazungula, and Kalomo Districts.
  - 136 ZCFs were trained (see above).
  - 2,224 community CHANGES focal point persons were trained in Choma, Kalomo, Kazungula, and Livingstone Districts.
- ZCF Review Workshops (three-day refresher workshops) were held in Kalomo, Kazungula, Choma, and Livingstone Districts.
- District Stakeholders' Meetings were held in Kalomo, Kazungula, Choma, and Livingstone to assess progress and to plan the way forward.
- A Provincial Stakeholders' Meeting was held in Livingstone one year after the CSMC was refocused to assess progress, problem-solve, and map the way forward.

In Eastern Province, the **School Health and Nutrition (SHN)** component of the CHANGES programme attained the following progress during the reporting year:

- The training manual for administering the Cognitive Assessment Instrument (CAI) was completed; later in 2002, the revised SHN Administration manual, used to train teachers and health workers, was completed.
- Approximately 150 pupils, as part of a sub-sample from the 2001 SHN baseline survey, were retested. While bilharzia re-infestation remained fairly low (which means that deworming once a year, instead of twice a year, is sufficient), anaemia rates increased, most likely due to the hunger situation in EP.
- CHANGES assisted the MOE in an assessment of 70 schools in Luapula Province in preparation for designing and implementing a School Feeding Programme; CHANGES also played a leading role in writing the MOE's School Feeding concept paper. After numerous discussions and planning meetings, the MOE, in collaboration



with the World Food Programme, is preparing to start implementing a school feeding programme in three districts of SP in early 2003. Interest has been expressed in using the district and zonal-level structures that have been put in place by the CSMC to implement the feeding programme.

- The Partnership for Child Development (PCD), a CHANGES sub-contractor, trained staff from TDRC (Tropical Disease and Research Centre) in Ndola in how to conduct transferrin receptor analysis, a test for detecting iron deficiency anaemias. TDRC staff, as a result, have the capacity to conduct this analysis for the SHN programme in the future.
- The drug distribution system in EP was established in early 2002 and pilot-tested with the first batch of deworming drugs and micronutrients. Although there have been some hiccups, the system is working as intended.
- After the October 2001 baseline survey, 2,325 pupils from 11 intervention schools were administered deworming drugs; after the 2002 second survey, 3,555 pupils were dewormed. In all, 31,350 pupils from five districts in EP are participating in the deworming and micronutrient provision programme.
- 63 teachers, health workers, and community development assistants were trained to carry out the second SHN survey, which was conducted in September 2002. In all, 1,917 pupils from Grades 1-7 in 40 intervention schools participated in the survey.
- In March 2003, 115 teachers, health workers, and district officers were trained in SHN Administration from Mambwe and Lundazi Districts of EP as the SHN programme expanded to those districts in an effort to accelerate the implementation of the programme.

Because **HIV/AIDS** is a cross-cutting theme in the CHANGES programme, most HIV/AIDS-focused work is integrated with broader CSMC and SHN activities. This being the case, the figures provided previously for the CSMC, and to some extent the SHN, capture work done in HIV/AIDS. In addition to that, the following were achieved:

- 40 schools and their catchment areas (approximately 200 communities) in EP were sensitized about HIV/AIDS by popular theatre groups working on behalf of the CHANGES programme.
- In EP, 26 Anti-AIDS Club patrons and eight District HIV/AIDS focal point persons were trained in HIV/AIDS awareness building and practical skills in designing and implementing HIV/AIDS-related initiatives.
- 30 head teachers in EP were trained in HIV/AIDS awareness and in how to link activities in Anti-AIDS Clubs with district HIV/AIDS plans.
- During May, a HIV/AIDS workshop was delivered for 10 teachers in EP on how to develop materials using locally available materials. The materials were then edited and sent to CDC in Lusaka for approval and production.
- Also in EP, 10 school counselors were trained in HIV/AIDS issues, particularly in how to obtain HIV/AIDS-related information from pupils. As an extension of this activity, research was conducted in 15 schools (involving 15 school counselors and 60 pupil “clients”) on the linguistic dimensions of HIV/AIDS counseling, focusing on the advantages of using local languages rather than English.
- A workshop for 29 teachers in Sinda (EP) on HIV/AIDS related issues was delivered collaboratively between the MOE and CHANGES.
- Funded and supported by CHANGES, the MOE’s assessment of the impact of HIV/AIDS on the education sector, was launched in January 2003. SIAPAC, a consulting firm from Namibia, is taking the lead and is working closely with the MOE

and CHANGES. The assessment will focus on six related areas: supply of education, demand of education, cost of education, process and quality of education, content and role of education, and effects on gender disparities. The assessment will take approximately one year to complete.

The **Small Grants Mechanism** achieved noticeable progress during the reporting year. In the early going, it naturally took time to establish effective mechanisms for awarding grants and for monitoring their implementation; it also took considerable time to sensitize schools and communities on the purpose of the small grants and what types of activities were likely to be funded. However, once the groundwork was laid, progress has been swift, including the following during the reporting year:

- District Steering Committees were formed in three districts of EP and six districts of SP.
- 22 small grants were awarded in SP; 11 grants were awarded in EP. (Total: 33 small grants awarded so far.)
- A small grants monitoring system was established in both SP and EP.

Now that the process of awarding and monitoring small grants is well established in both provinces, more emphasis will be placed next year on documenting the positive effects the grants are having on the CHANGES programme's primary initiatives in school health and nutrition, girls' education, and HIV/AIDS.

Although it is not formally a component of the CHANGES programme, because much work was completed during the year on **IEC (Information, Education, and Communication)** materials to support all CHANGES work, progress is worth briefly reporting. The following media products were completed during the reporting year:

- 2003 CHANGES Programme calendar
- 2003 SHN calendar
- SHN poster
- SHN Magazine (issues 1 and 2)
- CHANGES Programme brochure
- 8 (of 13) SHN television programmes, broadcast nationally
- 13 SHN radio programmes in Zambia's seven local languages, broadcast nationally
- HIV/AIDS poems supplemental reader booklet
- CSMC brochure
- "Making a Difference" CSMC success story booklet
- CHANGES Small Grants programme brochure
- Kazungula and Kalomo District Profiles (CSMC)

Finally, as the CHANGES programme heads into the final year of its initial three-year phase, considerable attention is being focused on designing the 18-month extension of the programme, which will carry the work forward through September 2005. An Extension Advisory Committee was set up in the MOE/HQ, a Statement of Work was developed for the extension design team, and three consultants (two Zambian and one expatriate) were recruited to begin the design process on 28 April 2003. The design work will take approximately four weeks to complete.



### III. PROGRESS DURING THE QUARTER

In this section, the progress and achievements attained during the January-March 2003 quarter will be highlighted for both of the major components of the CHANGES programme and their corresponding USAID Intermediate Results (IRs)—the Community Sensitization and Mobilization Campaign (CSMC) and School Health and Nutrition (SHN)—as well as for the two cross-cutting components: HIV/AIDS and the Small Grants Mechanism.

#### A. Community Sensitization and Mobilization Campaign (CSMC) (IR 2.1: Improved Quality of Learning Environments in Targeted Areas)

##### 1. Progress on Indicators

Priority/Category	Indicator	Means of verification	Target	Actual as of 08/02
<b>1. Participation of girls and other vulnerable children in basic education</b>	Increase in % of enrolment and retention rate of girls and other vulnerable children in basic education	Yearly school records (Data collected from five selected schools in each district)	Enrolment: 22%  Retention: 30%	Enrolment Baseline: 16% increase from 2000 to 2001  Retention Baseline: N/A
<b>Indicator 1.</b> The enrolment baseline of 16% increase in girls' enrolment from 2000 to 2001 was obtained from provincial records. For that same period, the enrolment increase was 22% for boys. The target for girls has been set at 22% in an effort to see girls' enrolment increased to be at par with boys' enrolment. The retention rate target has been set at 30%. Although no baseline information is available for this indicator, it was felt that the USAID target of 87% would be more attainable if the programme was working in urban areas. The high number of rural schools selected as research sites has influenced the CSMC to set the retention target at a lower rate.				
<b>2. Sensitization and Mobilization</b>	Number of schools, community local leaders, P.T.A. members and pupils sensitized and mobilized (to take action) concerning HIV/AIDS and girls/vulnerable children's education	Zonal-level Community Facilitator (ZCF) action plans and field reports	82,000	126,346
<b>Indicator 2.</b> There are 82 zones in the nine selected CSMC districts. Five schools and catchment areas are selected per zone. It is anticipated that at least 200 individuals within each school catchment area will be sensitized and mobilized as a result of the CSMC programme. (This figure will most likely be dramatically higher when the remaining catchment areas in each zone, which will have only community meetings and IEC inputs rather than receive all the inputs of the full CSMC model, are included.)				
<b>3. Gender and Equity</b>	Number of provincial, district and zonal officials and community-based animators sensitized and trained in gender and equity issues in education	Workshop attendance figures	365	266
<b>Indicator 3.</b> There will be approximately three participants from each zone, and five district-level officials from each district trained in ZCF workshops in each district. Issues pertaining to gender and equity will be part of that training curriculum. Therefore, a target of 365 has been set (including 74 community mobilizers trained in Kazungula and Kalomo) from the nine selected districts.				
<b>4. Action Research</b>	Number of communities participating in action	Researchers' field reports	299	230

	research			
<b>Indicator 4.</b> Six villages are selected in each of the five selected school catchment areas in a district. Therefore, 30 villages in a district are expected to participate in action research. As such, according to the current work plan, a total of 270 villages will participate in action research from the 9 selected districts. (The additional 29 villages were from Kazungula and Kalomo Districts in which all villages (89) participated in action research rather than only 60).				
<b>5. Research and Verification</b>	Number of community members present to verify the research	Head-count by researchers	18,000	15,341
	Number of Theatre for Development performances for verification and research	Researchers' field reports	90	60
<b>Indicator 5.</b> There are a total of 45 school catchment area research sites in the nine districts. Two drama presentations will take place in each catchment area to verify research findings, for a total of 90 drama performances. It is anticipated that approximately 200 community members will attend each of the performances.				
<b>6. Participatory Monitoring</b>	Number of community activities (as detailed in action plan) monitored	Monitoring plans and reports	1,230	361
	Number of communities monitoring their own progress	Monitoring plans and reports	820	361
<b>Indicator 6.</b> With 410 school catchment areas in nine districts, it is anticipated that ZCF teams, district officials, and/or the CSMC team members will monitor at least three community activities in each catchment area. At the same time, at least two communities in each catchment area will have action plans that will be self-monitored by the communities.				
<b>7. Life Skills</b>	Number of zonal-level action plans including training on the use of life skills modules	Zonal-level action plans	41	7
<b>Indicator 7.</b> 82 Zonal-level action plans will be developed; half of those are expected to include material on life skills.				
<b>8. Information, Education, and Communication (IEC) interventions</b>	Use of a variety of communication media focused in promoting girls' and other vulnerable children's education and in sensitizing community members (including teachers, children) about HIV/AIDS proliferation and its mitigation	Actual media products	7	4 (Role Model booklet, CSMC brochure, HIV/AIDS poems supplemental reader, and CHANGES brochure)
<b>Indicator 8.</b> The target for media products is a total of seven, comprised of two radio programmes for HIV/AIDS, two radio programmes for girls' education, two illustrated annual reports for stakeholders, and one CSMC newsletter.				
<b>9. Action Plans</b>	Number of action plans developed by districts and zones (ZCFs)	Actual count of action plans filed at district, zonal and CSMC	82	69
	Number of communities			

	developing community action plans	offices	820	361
<b>Indicator 9.</b> 82 ZCF teams will be established in the nine districts, and each will develop an action plan for sensitization and mobilization in their zone. It is anticipated that two communities in each of 410-school catchment areas will develop community action plans.				
<b>10.Capacity-building at all levels</b>	Number of provincial, district, and zonal-level officials and community based animators able to facilitate community-based activities in participatory ways.	Workshop participant list	365	266
<b>Indicator 10.</b> There will be approximately 246 participants from the nine districts (82 zones x 3 persons) trained as ZCFs and about 45 district and provincial officials. Therefore, a target total of 365 has been set (which includes 74 community mobilizers trained from Kazungula and Kalomo Districts) in the nine districts in Southern Province.				

## 2. Highlights

### Research and Verification in Gwembe District:

Having held the initial stakeholder's meeting in Gwembe District during December to introduce the CSMC to representatives of the three line ministries (MOE, MOH, MCDSS), the Field Coordinator and the leaders of the two research teams went to Gwembe during 17-20 January to visit the research sites and to meet the headmasters of the schools and village headmen of the five catchment areas to prepare for the start of the research and verification. (Gwembe District is the sixth district in which the CSMC is operational in SP.) During this visit, the team visited the six villages in each of five selected catchment areas, and consulted with 31 headmen and five head teachers. Research and verification commenced on 10 February and ended on 14 March. Two drama performances were conducted in each catchment area at the end of the research period.

### Monitoring Activities in Livingstone, Kazungula, Kalomo, Choma, and Sinazongwe Districts:

Monitoring activities in the field continues to be a major undertaking on the CSMC to provide ongoing support to Zonal-level Community Facilitators (ZCFs) and to ensure quality control. During the reporting period, the following monitoring was conducted:

- **Livingstone:** During 7-10 January, the work in Simoonga, Palmgrove, and Mahulu Zones was monitored. The monitoring team found that, while some of the communities are relatively uninvolved due to not receiving personal material benefits (cash payments for participating), schools are relatively enthusiastic and on board the programme. Issues relating to the former were later addressed in the Livingstone District review workshop (see below).
- **Kazungula:** On 9 January, a member of the CSMC team traveled to Kasensa Zone to resolve a misunderstanding between the ZCFs in that zone which had resulted in a failure to reconcile funds. Because one of the key ZCFs failed to turn up at the meeting, the issue was not resolved at that time and was referred to the district CSMC team for action.

- **Kalomo:** On 17 January, the (CARE International) CHANGES Small Grants Coordinator traveled to Kalomo to meet with nearly 100 head teachers from the entire district. The purpose of the meeting was to brief the head teachers on the CSMC, especially the small grants component. Now that the head teachers are clear about the programme, it is anticipated that more proposals for grants will be developed in schools. On 21 January, the CSMC Field Coordinator visited Syachitema, Chikanta South, and Omba Zones to check on progress; he found that communities were, overall, actively participating in the programme. On 7 March the Field Coordinator returned to Kalomo to hold discussions with district officials about unreconciled ZCF funds and insufficient involvement in the programme on the part of the MOH. He was assured that the two issues would be resolved.
- **Choma:** In February, the CSMC Field Coordinator traveled to Choma for meetings with ZCFs from Mbabala and Macha Zones. Because there were some difficulties with financial management, the bulk of the time was spent re-writing budgets and dealing with other financial matters. Aside from that, progress in Choma District is good: significant numbers of action plans and small grant proposals are being written and submitted to CHANGES.
- **Sinazongwe:** The Field Coordinator and Small Grants Coordinator traveled to Sinazongwe on 26 March where they met with district officers from the three cooperating line ministries. The main purpose of the visit was to clear up some confusion on the part of ZCFs between district-level action plans and zonal-level action plans, and to monitor progress in schools and communities. Progress in developing action plans has been encouraging.

### **District Stakeholders' Meetings:**

As the CSMC gains a stronger foothold in each district and matures as a programme, review workshops are held in each district on a regular basis to reflect on the objectives of the CSMC, to update progress on activities undertaken by the district and its ZCFs, to celebrate successes and examine challenges, and to build consensus on the way forward. During January, three such district review meetings were held:

- **Choma:** On 14 January two members of the CSMC team facilitated the district review meeting in Choma. The main issue discussed was the importance of compiling and tracking quantitative and qualitative data on CSMC progress in the zones. In addition to that, the district reported that all planned community workshops had been conducted by the ZCFs and that all the workshops were monitored by the district CSMC team. The challenges articulated included difficulties in distributing bicycles to ZCFs, reconciliation of funds by ZCF teams, lack of communication between the three line ministries at district level, and insufficient funds at the district level for stationery, photocopying, and other expendable office supplies. As a result of the meeting, it was decided that the district team will meet more often and improve communication, not only amongst themselves, but with the CSMC team as well.
- **Kalomo:** The same type of meeting as was held in Choma was held in Kalomo the following day, with the same objectives. The district CSMC team reported that all planned community workshops had been conducted and were monitored by the district team. School and community action plans and proposals for small grants have

been forthcoming as a result. A challenge mentioned pertained to insufficient funds at district level for monitoring activities.

- **Kazungula:** The following day, 16 January, a similar meeting was held in Kazungula District. Again, the district team reported that all planned activities had been completed and that the action plans and proposals are flowing from communities and schools, several of which have been funded. In terms of challenges, the long-standing non-reconciliation of funds by one zone was raised anew, and lack of funds for transport and allowances for monitoring by district-level officers were also mentioned. An agreement on an approach to resolving the issue of non-reconciliation of funds was reached during the meeting.

### **Monitoring Community-based Workshops in Sinazongwe District:**

From 20 to 23 January the CSMC Training Specialist traveled to Sinazongwe to visit and support the community-based workshops that were being conducted by the ZCFs. He visited Sinakasikili Basic School, Malima Basic, Siamuyala Basic, and Maamba Mine Basic School where the workshops were being held. The workshops were well attended (124 participants in all) and the facilitation was, for the most part, effective.

While in Sinazongwe District, the Training Specialist also held a meeting with the district CSMC team to assess progress. An issue that was raised in this meeting pertained to difficulties in adopting a multi-sectoral approach, particularly in terms of information sharing among the three line ministries that are implementing the CSMC. A further issue that was raised related to lack of funds at the district level for monitoring and for requisites like stationery, typing services, and photocopying. The Training Specialist agreed to take up the two issues with the CSMC team and the provincial MOE.

### **District Review Workshops for ZCFs:**

Three-day review workshops for ZCFs were held in Choma (4-6 February) and Livingstone (11-13 February) Districts as part of the ongoing effort to review progress, problem solve, and fine-tune the programme. The objectives of the workshops were: (1) To review progress made by the CSMC in the district; (2) to share difficulties and challenges; (3) to share lessons learned; (4) to provide additional training to ZCFs; and (5) to agree on the way forward. In both cases, the five objectives were achieved, and the ZCFs returned to their zones with a clearer understanding of the CSMC and the important role they play in the programme's success.

### **Provincial Stakeholders' Meeting:**

Last year, in April 2002, an important provincial-level meeting had been held to "re-launch" the CSMC along the lines the programme had been refocused when Dr. Janet Robb, an external consultant, had worked with the CSMC team in March 2002. A year later, it was deemed appropriate to reflect on progress; therefore, on 4 March 2003, a provincial-level meeting involving representatives of the three cooperating line ministries (MOE, MOH, MCDSS) and the CSMC team was held at the Fairmount Hotel.

The objectives of the meeting were to review the objectives, strategies, and principles of the CSMC; to update provincial stakeholders on progress made in the previous year; to share

achievements and challenges encountered; and to build consensus on the way forward. An issue that was raised and addressed during the meeting was the need for more provincial involvement in the CSMC, especially in terms of field visits and monitoring so that provincial-level officers are more in tune with the programme and can better support it. The meeting successfully achieved the intended objectives and set the CSMC on a firmer footing for future implementation.

### **Entry and Site Selection in Mazabuka District:**

The initial stakeholders' and site selection meeting in Mazabuka District was held on 21 February. 15 people attended the meeting, including the following: the DEO, EO, HIV/AIDS focal point person, the DIP (District Inservice Provider), two representatives of the MCDSS, two persons from the MOH, and CSMC personnel. The five schools and catchment areas selected for the research and verification were:

Kalama Basic School (Mwanachingwala Zone)  
Namaila Basic School (Hanjalika Zone)  
Hapiku Basic School (Mwenda Zone)  
Hampwaya Basic School (Naluwama Zone)  
Ndeke Basic School (Central Zone)

The research and verification is scheduled to start in Mazabuka District in early April and will be completed by mid-May.

### **Data Base Development and Management:**

One of the ongoing difficulties the CSMC has been facing is capturing and compiling relevant data from the field for planning and reporting purposes. Considerable progress was made in this regard during the current reporting period. Data files were created for each district and research data are now being entered for each district in the data base for easy access. Data matrices have also been created for each district to input data from the questionnaires used by the field researchers in the field. EPI-Infor software has been sourced and is being used for this data management.

### **IEC (Information, Education, and Communication) Materials Development and Dissemination:**

Considerable progress was achieved this quarter on the CSMC in terms of IEC product development and dissemination:

- The success story booklet "Making a Difference" was completed and disseminated.
- The CHANGES Programme Small Grants Scheme brochure was printed and distributed.
- The Southern Province HIV/AIDS poems booklet (supplemental reader) was printed and disseminated.
- The CHANGES programme 2003 calendar was produced and disseminated.
- Work was started on the first three of a 13-part series of radio programmes focusing on the CSMC. In March, the producer from EBS (Education Broadcasting Service) spent a week in SP collecting information and conducting taped interviews.
- A draft of the first CSMC Newsletter was completed, and is being reviewed.

- The Kazungula and Kalomo District Profiles were completed and sent to the printer for printing.
- Drafts of the Choma and Livingstone District Profiles were completed; editing is underway, and the profiles will be printed and disseminated early next quarter.

## **B. School Health and Nutrition (SHN) (IR 2.2: Improved Delivery of School-based Health and Nutrition Interventions to Support Pupil Learning)**

### **1. Progress on Indicators**

Category/Level	Indicator	Means of Verification	Target Numbers	Actual Numbers
<b>Child Quality Measures</b>				
Education	Increase in cognitive assessment scores	Scores from Cognitive Assessment Instrument (CAI)	To be provided by SI when analysis is complete	1st Year baseline follow-up survey conducted- 60 schools –assessment of 1,917 pupils cognitive assessment and new reading test
Health	Reduction in worm infection prevalence	Preliminary results indicates substantial reduction in infection	Complete results due by May 2003 Including Vit A and Iron levels	1st Year baseline follow-up survey conducted Sept/Oct 2002, 1,917 samples collected from 40 schools-evidence of substantial reduction in bilharzia and worm infestation-vitamin A and iron analysis to be done by TDRC-
Nutrition	Increase in haemoglobin levels	Semi-annual biomedical assessment	Sub-sampling to be done in April 2003-400 pupils in 8 schools	1st Year Baseline followup conducted Sept. Oct. 2002-preliminary results show increase in haemoglobin levels evidence of problems of anemia due to food scarcity situation
<b>Community Sensitization and Mobilization</b>				
PTA/Community meetings/ADC (Area Development Committee)/Neighborhood health committees	# of meetings to discuss SHN issues; problems-analyzed and responded to.	Survey reports; field monitoring –minutes of meetings	By end 2002 100 meetings held by PTAs, ADCs, and Neighborhood Health Committees	40 communities and school catchment areas (approx. 10-12 schools/catchment) sensitized through popular drama/public meetings and discussions with headmen; 320 meetings of PTA and SHN promoting committees held
PTA/Community action plan development and implementation	Increase of PTAs/communities supporting SHN interventions with	Survey reports; field monitoring	Cumulative total of action plans received 2001-31 2002-60	80 community action plans developed- and submitted for small grant funding;



	specific action plans		2003-80	12 small grant projects have been awarded-by end 1st qtr. 2003
<b>Information, Education, and Communication</b>				
Media strategy	Media strategy developed and implemented including radio, TV adverts, newsletters, newspaper.	Strategy available	Media strategy (regional and national)	Media strategy developed
IEC materials	IEC materials developed for SHN advocacy and Training	IEC materials available	2002-12 products Radio spots- Pamphlets Newsletters Brochures 2003-new products include SHN leaflets, 2nd newsletter, TV programmes recorded Calendars HIV/AIDS poems	Local language producers visited Eastern Province and are currently developing Radio programmes broadcasts-scheduled for 1st and 2nd qtr. 2003- 2x per month on SHN, and HIV-SHN posters and brochures distributed to all EP districts; New Commercial station Radio Breeze-series of SHN programmes to be scheduled in 2nd qtr. 2003
Teachers/pupils	# teachers using IEC materials for SHN teaching-including life skills	Observation/monitoring of teachers	2002-150 teachers trained 2003-150 trained 2004-50	240 Teachers using worm HE flipchart, local action manual and brochures include flipcharts being used by health workers-on worms and Bilharzia
<b>Training</b>				
Teachers and administrators	# of teachers trained in school-based health and nutrition interventions	Reports	2002 –250 2003-350 cumulative total teachers trained + administrators 2002=50 2003=100 2004=200	An additional 115 teachers and administrators trained in Mambwe and Lundazi districts-BESSIP and CHANGES collaboration scale-up activities in two new districts-training for Central and Lusaka Provinces scheduled for 2nd qtr.
Pupils	# of pupils who have received the set number of health education lessons	Reports	By end 2002 15,000 pupils received the lessons By end 2003 25,000; by March 2004,	Health education lessons for prevention of worms, bilharzia and improved nutrition received in all SHN schools # 15,000 approx. by end 1st qtr.

			30,000	2003- health workers in some schools are using flipcharts and providing health education on preventive activities
Health workers, community leaders, PTA members.	# PTA exec.members, ADC, trained in collaborative methods, group participation techniques, SHN advocacy, and management skills  # Health workers trained in SHN advocacy and SHN issues	Reports and field monitoring	By end 2002, 400 trained; by end of 2003, an additional 250 PTA, health workers and community leaders trained; by March 2004, a further 100 additional	Management skills training of 115 teachers-including basic financial management- as part of small grant component; additional financial management training conducted with CARE International. PTA executive orientations will continue for new interventions 1st qtr. 2003.

## 2. Highlights

### Provincial SHN Coordination Committee Meeting:

A key Provincial SHN Coordination Committee meeting was held on 10 January at the Provincial Resource Center in Chipata. The meeting was chaired by Mrs. Chirwa, MOE SHN Focal Point Person, and was attended by 28 officers from five EP districts: Chadiza, Chama, Chipata, Lundazi, and Mambwe. Provincial MOH and MCDSS officials also attended the meeting. Each district team presented a report on SHN activities conducted by their district during the past year. The CHANGES SHN team also presented an overview of the past year's activities. The participants also discussed the proposed Terms of Reference for the committee and resolved to meet twice a year to enhance collaboration and integration of efforts.

### Monitoring School and Community Activities:

During January, the major activity undertaken by the SHN team was monitoring and following up activities in the 40 intervention schools (20 new and 20 old). Initially, the EP Coordinator sent letters to all new intervention schools with an attached list of the results of the biomedical survey for bilharzia that was conducted during September 2002. If the prevalence in a school was 45% or higher, plans were made to conduct mass treatment of all pupils in the school. Nine schools required mass treatment, which was started in February (see below).

Drug administration is generally going well and the SHN team has now redistributed surplus drugs to some schools and has taken the excess to DHMTs (District Health Management Teams) for storage. Storage conditions in RHCs (Rural Health Centers) were also monitored in Chadiza and Chipata Districts. While visiting the schools, the SHN team collected original treatment forms from 19 schools to pass on to the Partnership for Child Development (PCD), a CHANGES sub-contractor, which is taking the lead on the biomedical research side of the SHN programme.

### **Mass Treatment of Intervention Schools:**

During 11-20 February, all CHANGES staff and the provincial MOE SHN Focal Point Person were involved in mass treatment of nine schools (six in Chipata and three in Chadiza Districts) that had a bilharzia prevalence rate of 45% or higher during the September 2002 survey. A total of 3,555 pupils were treated during this process, as depicted in the following table:

Serial No.	School	Date of treatment	Number of pupils treated		
			Girls	Boys	Total
1	Sisinje	11-Feb-2002	153	157	310
2	Mtaya	11-Feb-2003	160	200	360
3	Kapara	12-Feb-2002	155	155	310
4	Mshawa	12-Feb-2003	138	178	316
5	Bwanukha	13-Feb-2003	268	346	614
6	Chanjowe	13-Feb-2003	70	112	182
7	Kalembe	14-Feb-2003	64	143	207
8	Kasenengwa	17-Feb-2003	365	479	844
9	Mnoro	20-Feb-2003	259	153	412
<b>TOTAL</b>			<b>1,632</b>	<b>1,923</b>	<b>3,555</b>

Cooperation from teachers, PTA members, and parents was excellent throughout. The fact that large numbers of parents attended the exercise, and even participated in organizing the pupils, was a positive sign of community interest and involvement in the SHN programme.

### **Establishment and Monitoring of Health Promoting Schools:**

The SHN team's efforts to establish and support Health Promoting Schools according to local action guidelines continued during the reporting period. Before establishing new Health Promoting Schools, the team developed a checklist of 12 criteria used to establish and monitor the schools; these criteria include the school having access to health services, active health promoting clubs, SHN resource center, SHN garden or production unit, provision of safe drinking water, provision of sanitary facilities, and so on. During January, 15 schools (11 of which were intervention schools) were visited and assessed according to the criteria. While progress is uneven at this stage, most of the schools were found to be making progress towards meeting the established criteria.

### **NGO Coordination:**

A meeting of the EP NGO Forum was held on 19 February, and was attended by Mr. Josias Zulu of the SHN team. One of the main issues discussed was how to make the forum a legal entity. The CHANGES office assisted in drafting the Terms of Reference (TOR) and Mr. Zulu attended two sub-committee meetings to discuss details of the formation of an executive committee, development of a constitution, and revision of the proposed TOR. The CHANGES programme will sponsor a future meeting of the forum.

### **Training of Head Teachers, Teachers, Community Development Officers, and Health Workers from Mambwe and Lundazi Districts:**

Although the current CHANGES contract requires the programme to implement the SHN programme in 80 schools, due to interest on the part of the MOE and CHANGES staff to

accelerate the pace of the programme, it was decided to expand the programme to include 20 schools each from Mambwe and Lundazi Districts in EP. The expansion was initially scheduled to take place in January but, due to delays in obtaining funds from the MOE for training, the training of key personnel took place during 5-8 March in Mambwe and 11-14 March in Lundazi.

In Mambwe District, 55 people were trained: 22 head teachers, 21 teachers, seven health workers, two community development personnel, the DEO, the DIP (District Inservice Provider) and the DIS (District Inspector of Schools). During the workshop, new training materials and exercises were pilot tested and are now included in a revised version of the SHN training manual. Practicals were conducted in Mfuwe Basic School during which use of the tablet pole and the bilharzia questionnaire were focused on. (It was found that the prevalence rate was 33% lower than expected.) Action plans were then developed for each school represented by the participants.

The training in Lundazi District was attended by 60 people: 13 head teachers, 29 teachers, 11 health workers, two DHMT staff, and five officers from the district office. The content covered was similar to that in the Mambwe workshop, except that, for the first time, a pre- and post-test were used to assess participants' knowledge. In addition, the practical session in schools involved the participants talking with parents and answering their questions as they administered drugs to pupils.

### **Planning for the 2003 Re-Infection Mini Survey:**

A mini survey to determine the rate of bilharzia re-infection since the September 2002 survey will be conducted during 7-11 April. This was planned with Dr. Michael Beasley of PCD during the third week of March in Lusaka. Eight schools will be involved (four new intervention schools and four old intervention schools); 50 pupils will be selected from each school out of those originally sampled in the previous surveys, for a total of approximately 400. The CHANGES office organized equipment, informed all relevant parties, and visited the eight schools prior to the start of the mini survey.

### **Assessment of the MOE's Health Pre-payment Scheme:**

Since last year, the MOE has been implementing a pre-payment health scheme in districts in EP in which the SHN programme is being implemented. The original intention was to provide a safety net (in terms of treatment at Rural Health Centers) for when pupils display side effects from taking deworming drugs. Evidence so far has suggested that few pupils have accessed the scheme for matters relating to its original purpose and that the scheme is therefore quite costly. Of three sampled schools and health centers, it was found that in Kesenegwa School utilization was high (187 cases) while in other schools, utilization was low (41 cases in Chipata School and 71 in Mtizwa School). Most of the pupils went to the health clinics for conditions not related to taking the deworming drugs.

The CHANGES SHN team has started discussions with DHMTs and MOE officers to assess the current scheme (how many pupils are using the scheme, what is the cost per pupil, etc.) and, on that basis, will recommend alternative, more cost-effective options such as a pre-purchase scheme or allocating funds directly to schools for children to use in accessing services at health clinics. Aside from issues of efficiency and cost-effectiveness, there is also concern to prevent dependency and to dissuade villagers from developing the view that

School Health Cards, which are used to access the pre-payment scheme, are simply a ticket to free health services.

### **Preparation of an Application for Schistosomiasis Control Initiative (SCI) Funding:**

As a way to obtain funds for deworming drugs and activities related to implementing the SHN programme, Zambia was approached by the SCI in the UK with an opportunity to apply for funds from the Bill and Melinda Gates Foundation. Therefore, during March a series of meetings was held in Lusaka by the MOE, MOH, and CBOH, most of which were attended by the CHANGES Senior Technical Advisor, to complete the application. In the end, an application for approximately \$5.5 million was submitted.

The process of strategizing and planning for the SCI was fortuitous for the CHANGES programme because much of what was included in the application dovetails with what are likely to be the broad contours of the extension of the CHANGES SHN programme during 2004-2005. As such, the designing of the SHN component of CHANGES, which is now scheduled to be completed next quarter due to unavoidable delays (see Part IV below), will be guided by the work already completed on the SCI application. It is hoped that this will result in enhanced synergy and integration of the CHANGES SHN programme with the broader national SCI plan.

### **Reporting on the SHN Programme in an International Forum:**

The EP Coordinator and the Senior Technical Advisor attended the 47th Annual Conference of the Comparative and International Education Society (CIES) in New Orleans, Louisiana (US) during 12-16 March. The EP Coordinator gave a presentation of the Zambia SHN programme in a panel discussion chaired by the Senior Technical Advisor. The presentation on Zambia was well-received and stimulated thoughtful discussion from the audience.

### **Progress on SHN-Related IEC Products:**

The following was achieved on SHN IEC product development and dissemination during the present reporting period:

- The first 13-part SHN radio series in local languages was produced and aired.
- Eight of the 13 SHN television programmes were produced and aired; on one programme, focusing on the EP SHN programme, the EP Coordinator, Josias Zulu (CHANGES SHN advisor), and Mrs. Chirwa (EP SHN Provincial Focal Point) were the panelists.
- The second issue of the SHN Magazine was completed and disseminated.
- A one-week workshop on SHN IEC product development was conducted, attended by Mrs. Chirwa of EP as well as SHN staff at the MOE/HQ, in the interest of capacity building and sustainability.
- The CHANGES HIV/AIDS poems supplementary reader was completed and disseminated.
- The CHANGES Small Grants Scheme brochure was completed and disseminated.
- The CHANGES Programme brochure was printed and distributed.
- The 2003 SHN calendar was printed and disseminated.

Additionally, discussions were held by the SHN team in Chipata with Radio Maria and Radio Breeze (a new commercial station in Chipata) for a series of programmes on SHN. A budget was also developed for this purpose: the cost of the series of 26 radio programmes (in English and Nyanja) will be approximately six million kwacha.

## C. HIV/AIDS (Cross-Cutting Component)

### 1. Progress on Indicators

#### Southern Province:

Priority/Category	Indicator	Means of verification	Target	Current Status
<b>HIV/AIDS</b>	Number of provincial, district and zonal officials and community based animators sensitized and trained in HIV/AIDS issues.	Workshop attendance figures	365	266
There will be approximately 246 participants from the nine districts trained as ZCFs and about 45 district and provincial officials. HIV/AIDS sensitization will be a part of that training curriculum. Therefore, a target total of 365 has been set (which includes 74 community mobilizers trained from Kazungula and Kalomo Districts) in nine districts in Southern Province.				
<b>HIV/AIDS Peer Educators</b>	Number of zonal –level action plans including the training of peer educators for HIV/AIDS	Zonal –level action plans	41	15
Of the approximate 82 zonal-level action plans, 50%(41) of those are expected to include the training of peer educators.				

#### Eastern Province:

Category/Level	Indicator	Means of Verification	Targets	Current Status
<b>Teachers</b>	# teachers using life skills Modules/lesson plans used in teaching	Field monitoring	Evaluation and use of Life skills modules revised pending completion of MOE TOTs on use of interactive teaching materials and use of life skills manual training	Sensitization workshop for Anti-AIDS patrons held for 29 teachers.  Workshop on Psycho-social counseling for teachers and Service Corps: 35 trained.  Linguistic aspects of counseling Operations research workshop to discuss results scheduled for 2nd qtr. 2003; data analysis on-going.
<b>School/Communities; Pupils and village communities</b>	# schools engaged in debate competitions,	Field monitoring Reports	Situation analysis of Anti-AIDS clubs in 40 schools in	Local language materials to be edited and submitted to CDC and printed

	quizzes, drama, choirs, essay writing, and various other innovative activities		4 districts- to be done in 2nd quarter of 2003  By end 2003 80 By March 2004 90 schools	after approval by 2nd qtr. 2003
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## 2. *Highlights*

### **Progress in Eastern Province (EP):**

The following was accomplished in EP with regard to HIV/AIDS:

- During 26-28 March an HIV/AIDS prevention workshop was held in Sinda for 29 teachers and head teachers from Chadiza, Katete, and Petauke Districts. The EP Coordinator and Mr. Zulu of the CHANGES programme facilitated four sessions of the workshop.
- Members of the SHN team met with Mr. Hamwaka (former EP Counseling Focal Point) to follow-up on activities related to the operations research on the linguistic aspects of HIV/AIDS counseling in schools. Mr. Hamwaka will continue to analyze the data and will draft a preliminary report of the findings. A meeting of all counselors involved in the study and the researchers who gathered the data will be held next quarter.
- Planning was conducted for a meeting in April of the editorial committee to discuss local HIV/AIDS materials that were developed during a workshop in Sinda in 2002. The materials will be revised before being submitted to CDC (Curriculum Development Centre) in Lusaka for approval.
- Mr. Josias Zulu, SHN Advisor on the CHANGES team, facilitated a HIV/AIDS psycho-social counseling course during 17-21 March for 35 participants, mostly community-based volunteers. Also included in the course were three teachers, two health workers, and three people from the Service Corps. The workshop was funded by Africare.

### **SIAPAC Impact Assessment of HIV/AIDS on the Education Sector:**

The assessment of the impact HIV/AIDS is having on the education sector in Zambia, which is being implemented by SIAPAC (Social Impact Assessment and Policy Analysis Corporation) in collaboration with the MOE and CHANGES, made considerable strides during the present quarter. The consultant team (together and in part) made several trips to Zambia to work with the MOE. A Steering Committee, comprised of MOE and non-MOE stakeholders, as well as a Working Group within the MOE, were formed and met several times to provide direction for the work. As an outcome of those meetings and the work in general accomplished to date, SIAPAC submitted an Inception Report on 18 March, which details the work to be done on the assessment. (See Appendix A for that report.)

During March, key activities included continuing with data collection within the MOE and from other related government entities and organizations, and recruiting and training four field researchers. The researchers will commence data collection in five provinces—



Copperbelt, Eastern, Lusaka, Northwestern, and Southern—in a total of 50 schools as well as in provincial and district education offices, on 7 April. (For further detail on progress achieved on the impact assessment see Appendix B: SIAPAC Progress Report #1.)

#### **D. Small Grants Mechanism (Cross-Cutting Component)**

*[This section of the report was submitted by Anderson Chibwa, Small Grants Programme Manager at CARE International.]*

##### **1. Progress in Eastern Province:**

#### **Assistance to Recipient Organizations in Setting Up Financial and Administrative Systems:**

The Small Grants Coordinator (SGC) in EP conducted financial and administrative meetings with the Parent Teachers Associations, Project Management Teams and teachers from Chama Basic School and Care for Children in Need in Chama District. The District Steering Committee members were also present at these meetings. The main objective of the meetings was to familiarize the Recipient Organizations (ROs) with the CHANGES financial requirements and help them establish financial and administrative systems to avoid any confusion once they commence the implementation of project activities. The steering committee members attended these meetings because they play a role in the monitoring of grants utilization. The Steering Committee chairpersons for the committees will be signatories for cash withdraws for easy control in the use of funds. The attendance at both meetings was as follows:

Organization	Male	Female	Attendance
Steering committee	06	01	07
Chama Basic	05	02	07
Care for Children in Need	04	03	07
Total	15	06	21

During the same visit to Chama Basic the SGC had a meeting with a women's club called Tikolane Women's Club, a group supporting the SHN programme by assisting the school prepare food for pupils as part of a feeding programme. The group membership is 20. After the meeting, the group resolved to undertake projects that will include the following activities to supplement school efforts to improve the health and nutrition status of pupils: vegetable gardening, preparing snacks for pupils, home based care, chicken rearing, and HIV/AIDS awareness. With assistance from the Steering Committee the group currently is working on a project proposal to submit to CHANGES for funding.

#### **Monitoring the Utilization of Small Grants:**

Project activities for the first seven funded organizations are going on well and, from the monitoring exercise conducted and reports from ROs, the outcomes so far are as follows:

##### **Women Against AIDS and Poverty:**

Organization	District	Project Title	Project Activities
Women Against AIDS and	Chadiza	HIV/AIDS Awareness	<ul style="list-style-type: none"> <li>▪ Drama Performances</li> <li>▪ Produce chewa leaflets on</li> </ul>

Poverty			HIV/AIDS <ul style="list-style-type: none"> <li>▪ HIV/AIDS quiz in schools</li> <li>▪ Strengthen/form Anti- AIDS Clubs</li> <li>▪ HIV/AIDS workshop for teachers</li> </ul>
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During the reporting period few activities were undertaken. However, a monitoring exercise to five project areas with the SGC was conducted. The following were the schools and communities visited: Chanida, Taferansoni, Katantha, Mangwe and Nsadzu. In all these areas the women are conducting HIV/AIDS awareness campaigns together with the Anti-AIDS Clubs in the respective schools and surrounding communities. The group has also conducted HIV/AIDS quiz and drama competitions for seven Anti-AIDS Clubs, which were held in March. During the monitoring exercise, the executive of the group was advised to improve the capacity of branch members in the implementation of the project.

So far, 33,500 people from the communities surrounding Taferansoni, Nsadzu and Chanida, Katantha and Mangwe schools have benefited from the activities by Women Against AIDS and Poverty (WAAPO). The group intends to produce HIV/AIDS leaflets in local languages and to continue with HIV/AIDS quiz and drama competitions.

***Joannie Cronje Basic School:***

Organization	District	Project Title	Project Activities
Joannie Cronje Basic School	Chipata	School Based Health and Nutrition	<ul style="list-style-type: none"> <li>▪ Cattle rearing</li> <li>▪ Crop production</li> <li>▪ Construction of 4 VIP latrines</li> <li>▪ Rehabilitate a 1X2 classroom block into an HIV/AIDS center</li> </ul>

The crop production component is doing well and the school feeding programme has been supplemented by the supply of cassava cuttings obtained from Lutheran World Federation (see below). 11,069 members of the community are benefiting from the HIV/AIDS center, while 551 pupils are benefiting from the VIP latrines.

***Magwero Standard Basic School:***

Organization	District	Project Title	Project Activities
Magwero Basic School	Chipata	Magwero Fish Farming and Nutrition	<ul style="list-style-type: none"> <li>▪ Rehabilitation of 5 fish ponds</li> <li>▪ Construction of 10 VIP latrines</li> <li>▪ Poultry Farming</li> <li>▪ HIV/AIDS awareness and Health Education</li> <li>▪ School feeding</li> </ul>

Four fishponds have been stocked with a total of 2,245 fingerlings. The rehabilitation of a 1x3 classroom and the construction 10 VIP latrines have been completed. The Anti-AIDS Club has been revitalized and is active in disseminating HIV/AIDS messages through drama and poems.

***Taferansoni Basic School PTA:***

Organization	District	Project Title	Project Activities
Taferansoni PTA	Chadiza	HIV/AIDS awareness and Construction of VIP latrines	<ul style="list-style-type: none"><li>Construction of VIP latrines</li><li>Crop Production</li><li>HIV/AIDS awareness</li></ul>

The slabs for all of the 10 VIP latrines have been laid and the school tuck shop is doing well as an income generating activity. The Parents Teachers Association committee intends to buy costumes for the school's Anti-AIDS Club from tuck shop profits. The project is benefiting 450 pupils and 750 community members from the school's catchment area.

***Zambia Students Christian Movement (ZSCM):***

Organization	District	Project Title	Project Activities
Zambia Student Christian Movement	Chipata	Gender Awareness	<ul style="list-style-type: none"><li>Create awareness on girl child education</li><li>Capacity building on girls education</li><li>Production of training materials</li><li>Production of brochures and translate them into local language</li><li>Crop production</li></ul>

ZSCM conducted an orientation workshop for teachers and community based organizations (CBOs). A total of seven teachers and three members attended. The District Small Grants Committee also attended the workshop. During the workshop it was resolved that, for field activities, the ZSCM should work with the National Cultural Peace Workers Team as they were more familiar with the SHN programme in schools. ZSCM has produced training manuals, brochures and posters regarding education and the girl child.

***Dzoole Basic School:***

Organization	District	Project Title	Project Activities
Dzoole Basic School	Chipata	School Health and Nutrition	<ul style="list-style-type: none"><li>HIV/AIDS awareness</li><li>Construction of a counseling and feeding center</li><li>Crop production</li><li>Cattle rearing</li><li>Rehabilitate a classroom block</li></ul>

Crop production for the school feeding programme in the school is doing well. The school has two limas (about half an acre) each of beans, maize, soybeans, and groundnuts. The rehabilitation of classroom blocks has been completed, two cattle have been purchased, and the community has dug the foundation for the HIV/AIDS Center block. Approximately 350 pupils are benefiting from the school feeding programme.

### ***Chipangali Basic School:***

Organization	District	Project Title	Project Activities
Chipangali Basic School	Chipata	Rehabilitation of a bridge and HIV/AIDS awareness	<ul style="list-style-type: none"><li>▪ Rehabilitation of a bridge</li><li>▪ Rehabilitation of a community hall into an HIV/AIDS center</li><li>▪ Crop production</li></ul>

More than 5,000 people are benefiting from the bridge that was constructed as it is the major link to the school and clinic; in turn, attendance at school improved during the recent rainy season. The bridge has given all-year access to school-going pupils.

### **Disbursement of New Grants:**

During the reporting period two new grants were disbursed, one to Chama Basic School and the other to CAFCHIN (Care for Children in Need); the details for the projects to be undertaken are outlined below:

Name of Organization	District	Project Title	Project Activities	Amount disbursed ZKwacha
Care For Children In Need	Chama	Children Under Stress Assistance	<ul style="list-style-type: none"><li>▪ Create HIV/AIDS awareness</li><li>▪ Cattle Rearing</li><li>▪ Support towards orphans</li></ul>	21,358,000
Chama Basic	Chama	Kanjiki Counseling Center	<ul style="list-style-type: none"><li>▪ Create HIV/AIDS awareness</li><li>▪ Construct a counseling center</li><li>▪ Promote Girl Child Education</li></ul>	21,137,200

Both Recipient Organizations (ROs) were presented with cheques during a colorful ceremony held at Chama Basic School. The ceremony was officiated by the District Inspector of Schools who urged other schools and communities to emulate what recipient organizations were doing to access grants from CHANGES.

### **Regular Contact and Meetings with Stakeholders:**

The SGC attended the provincial SHN Steering Committee meeting in Chipata at which he presented a paper on the CHANGES small grants mechanism, placing emphasis on projects funded so far. The SGC also attended the PTA annual general meeting at Nsadzu School to advise on project proposal improvement.

### **Project Proposal Reviews in Chadiza and Chipata Districts:**

Project proposal review meetings were conducted in Chipata and Chadiza from which three proposals were recommended for funding. In Chadiza the committee recommended the

proposals from Mukumbuzi and Zemba Basic Schools for funding, while from Chipata the proposal from Lutembwe School was considered worthy of funding.

### **Supplementation of School Feeding Programmes:**

In order to supplement the school feeding programmes being implemented in EP, the SGC acquired cassava cuttings from Lutheran World Federation for distribution to five schools. A multiplier effect is expected to result as the schools which have benefited supply cuttings to other schools in the coming farming season, and so on thereafter. Each school was given 600 one-meter long cuttings from which  $\frac{3}{4}$  Lima (about an acre) can be cultivated. The schools that benefited are Chipata, J.M Cronje, Dzoole, Zemba, and Lutembwe. This is an innovative initiative insofar as this is not a cassava eating area. Cassava will provide food security during the dry seasons as well as during periods of drought.

### **2. Progress in Southern Province:**

The provision of small grants has continued to support the revitalized Community Sensitization and Mobilization Campaign (CSMC) activities of the CHANGES programme in SP. District Steering Committee meetings are being held more regularly to review project proposals, and stakeholders continue to meet to harmonize programme implementation. The small grants component is now a fully integrated part of the CSMC.

### **Assisting Recipient Organization (ROs) in Financial Management:**

The SP Small Grants Coordinator (SGC) undertook field visits to ROs to check on the keeping of financial records and to monitor overall progress. In almost all cases, teachers and health staff are the ones keeping financial records, and are doing a credible job.

### **Monitoring the Utilization of Small Grants:**

The following grant funded projects were visited during the reporting period:

#### ***Kazungula District:***

Organization	District	Achievements	Remarks
Siamasimbi School	Kazungula	Peer education training Production Unit planted maize and beans Donkeys- Purchased and very healthy Teacher's house is near completion	Financial records - good
Maunga School	Kazungula	Drama attire purchased Teacher's house at window level Girl's bath shelter foundation was laid.	There is a short fall of cement.
Moonde School	Kazungula	Production Unit- maize planted.	Other drought resistant crops to be planted.
Nyawa School	Kazungula	50 desks bought Anti-AIDS uniform bought	There is a short fall of

		Solar panel bought Girl's house- construction in process at window level	cement.
Chooma School	Kazungula	Cheque given on 7/01/03	
Sisters of St. Francis	Kazungula	Peer education done Home based training done Skills training, tailoring and carpentry.	Tailoring – 6 girls are undergoing training. Uniforms are being made for selling to the school at affordable prices.

***Kalomo District:***

Organization	District	Achievements	Remarks
Makoli School	Kalomo	Peer education training; Production Unit – maize, beans and groundnuts planted	Beans were attacked by aphids, but were sprayed; balance will be used to buy supplementary food for pupils.
Mubanga School	Kalomo	Cheque given on 22/12/02	Had problems in depositing cheque as they were not allowed to deposit in BESSIP account. They managed to open own account.
Mayobo Farmers Club	Kalomo	Cheque given on 28/01/03	Not able to deposit cheque as the Banks are requesting certificate of registration

***Choma District:***

Organization	District	Implemented Activities	Remarks
St. Mulumba School	Choma	Carpentry tools have been purchased	Skills training to the children with disabilities has started

**Capacity Building:**

ZCFs in a number of zones in Kazungula, Kalomo and Choma Districts were visited, including Musokotwane, Nyawa, Mukuni, Makunka, Simwanda, Chawila, Choma A & B, and Kalomo Central Zones. The purpose of the visits was to give feedback on proposals that had been appraised, to give technical advice on areas that needed adjustments, and to discuss activities that directly effect girls that may be supported financially by CHANGES. It was also during these meetings that organizations that had their proposals approved and signed the contract agreements.

### **District Review Meetings:**

Review meetings for Choma and Livingstone were held on 4-6 and 11-13 February 2003, respectively. A total of 53 ZCFs participated. (See Section IIIA on the CSMC for information on these meetings.) In addition to what was already reported about these meetings (above), community action plans (CAPs) and project proposals were revised and considerable emphasis was placed on how these should be developed. The role of the ZCFs was also clearly spelled out, and it was hoped that the communities and schools would benefit from the knowledge imparted to them.

### **New Disbursements Made:**

Southern Province has continued to receive increased submissions for grant funding. Kazungula District reviewed ten proposals of which seven were approved for funding. In Choma District 11 proposals were reviewed, of which four were approved. The proposals that were not funded were sent back for more information while some were referred to other funding institutions such as the Zambia Social Investment Fund (ZAMSIF). The table below indicates new projects that were funded in SP this quarter:

#	Organization	District	Activity	Amount
1	Nazilongo Basic School	Kalomo	Sanitation Health education	15,550,000
2	Mayoba school	Kalomo	H.E, Sanitation & HIV/AIDS	7,320,000
3	Siamankuli school	Kalomo	Sanitation, HIV/AIDS School rehabilitation	39,104,000
4	Simango basic school	Kalomo	HIV/AIDS Sanitation Rehabilitation of classroom	36,450,000
5	Mukuni basic school	Kazungula	Water and Sanitation	15,769,000
6	Sinde basic school	Kazungula	Rehabilitation of girls dorm Sanitation HIV/AIDS Production Unit	38,987,000
7	Musokotwane school	Kazungula	Electrification of classrooms; girl's dormitory; HIV/AIDS centre; Home economics and industrial arts.	49,315,000
				202,495,000

The small grants component of CHANGES in SP has overcome the initial difficulties that beset the programme in the early phases, and the component is now an integral part of CSMC activities. As a number of grants have been disbursed, in the next quarter a section on the impact as a result of the small grants component will be included in the quarterly report. The purpose of this will be to start documenting lessons learned for possible scaling up as well as replicating the experiences in both Southern and Eastern Provinces.



#### **IV. PROGRAMME ADMINISTRATION**

On the level of programme administration, there were several notable developments during the present reporting period. These are summarized below.

##### **Recruitment of CSMC Staff (SP):**

After experiencing some staff turnover, the CSMC, in hiring a new Research Coordinator and Office Orderly, assembled the last pieces of its staffing puzzle during the quarter. Subsequent to advertising the position, six applicants were interviewed for the Research Coordinator position, and Mr. Stephen Chanda was selected to fill the post. It is anticipated that filling this position with a qualified individual will strengthen the research side of the CSMC and will also lead to the more timely production of research reports, district profiles, and other programme documents. An Office Orderly was also hired to clean the office and grounds.

##### **Shift to New Programme Office (SP):**

Due to the increase in the number of CSMC programme staff and the limited space in the existing non-MOE office, the decision was taken to shift from the two rooms being rented in Liso House to a house/office on Kuta Way in Livingstone. At the time of writing, the team had just taken occupancy of the new office. To get the office fully functional, furniture was procured, more computers and printers were purchased, and an office orderly and gardener were hired. The considerable extra space in the new office will enable the CSMC team to work more effectively when in Livingstone, particularly when the field researchers are also in town. Importantly, the CHANGES office in the provincial MOE will be retained and will be the primary office of the SP Coordinator.

##### **Planning for the CHANGES Programme Extension:**

The CHANGES Senior Technical Advisor formed a MOE/HQ CHANGES Extension Advisory Committee, comprised of six MOE officers, to start the planning process for designing the CHANGES programme extension. Two meetings of the committee were called during which the Statement of Work for the consultant design team was agreed upon and two Zambian consultants for the team were selected, while Creative Associates International recruited an expatriate consultant in the US. Plans were finalized to start the design process on 24 March. However, due to the war in Iraq, USAID banned all nonessential travel from the US, meaning that the consultant identified in the US by Creative Associates could not travel to Zambia as planned, which forced a postponement of the design process. At the time of writing, Creative Associates International and the Senior Technical Advisor are in the process of recruiting a consultant from the sub-Saharan region to take the place of the US-based consultant, so that the design process can be started. It is anticipated that the consultant team will be assembled to start work in late April. (See Appendix C for the extension design team's Statement of Work.)

##### **CARE International Small Grants Programme Manager:**

In March, the CHANGES programme learned that Anderson Chibwa, who has been overseeing the small grants component of the programme on behalf of CARE, was named the

new Zambian High Commissioner to the UK. Tentatively, he plans to leave for London near the end of April. While the CHANGES programme is very pleased that Anderson will be moving on to bigger and better things, we are nevertheless sad to be losing the services of a much respected colleague. The CHANGES programme wishes Anderson all the best in his new endeavor.

## **V. CHALLENGES/LESSONS LEARNED**

Considerable progress was achieved during the present reporting period in the face of several constraints and challenges. While many of the constraints and challenges described below have been present for some time, they have been articulated more thoroughly and forcefully by the CHANGES field teams during the present quarter.

### **Challenges in Adopting a Multi-Sectoral Approach (SP):**

The hallmark of the CSMC is the manner in which it integrates inputs from the MOE, MOH, and MCDSS in a genuinely governmental multi-sectoral approach. While such an approach is appealing and appropriate in theory, implementing it in practice is challenging. An ongoing issue on the CSMC in this regard is the perception on the part of the MOH and MCDSS that they are mere assistants of the MOE, that they do not have genuine ownership over the programme to the same extent as does the MOE, which is the lead ministry.

### **Incentives for Stakeholders (SP):**

Another ongoing issue on the CSMC has been the expectation of incentives by personnel in the government tasked with implementing the programme. Many government officers see their work on the CSMC as an added responsibility, as something outside their normal government duties. Thus, when asked to carry out CSMC-related tasks, many officers drag their feet or refuse to participate at all. Moreover, reports from the field suggest that teachers are demanding monetary incentives for their contributions to implementing the CSMC. Embedding the CSMC within the government system is therefore proving to be an ongoing challenge for the CSMC team.

### **Conflicting Strategies with Other Donor Programmes (SP):**

Related to the preceding, some other donor programmes in SP maintain the practice of providing meals for community members at their public meetings. Some community focal point persons have reported low turnout at community meetings because CHANGES does not compensate villagers for participating in their own development.

### **Taking the CSMC to Scale (SP):**

As the CSMC becomes better known in SP, demand is growing to implement the programme in all schools of each district. However, insufficient human resources and the desire to keep the programme manageable have resulted in a situation where five schools from each zone in participating districts are currently included in the programme. This is an issue that will be addressed during the design of the CHANGES programme extension, which will be completed next quarter.

**Dilution of Messages (SP):**

The primary messages that comprise the CSMC move through several layers of stakeholders: from the CSMC team to the ZCFs, from the ZCFs to the community Focal Point Persons (FPPs), and from the FPPs to the teachers and pupils in schools and to members of the community at large. In the process, some of the messages have become diluted. This is another dimension of the programme that will require attention during the design of the extension.

**Competing Donor Programmes (SP):**

Recently it has been noted that the plethora of donor-funded programmes at the school level has created a situation in which schools and teachers are overwhelmed and cannot give sufficient attention to the programmes and, simultaneously, to the running of their schools and classes. For example, reports have been received that schools, especially urban ones, are participating simultaneously in programmes being implemented by SPRINT, PAGE, and Redd Barna, in addition to the CSMC. Some streamlining and improved coordination will help alleviate this situation.

**Frequent Transfer of Teachers (EP):**

In Eastern Province, the frequent transfer of teachers, which was reported last quarter, continues unabated. When teachers who are trained as part of the SHN pilot are transferred, important institutional memory and capacity are lost in the school and the replacement teacher (if there is one) must be trained. Not only is this inefficient, it calls into question the likelihood of the programme being sustained if transfers continue. In the short term, the SHN team is dealing with the transfer situation by holding extra training workshops for the new teachers.

**Low Attendance Rate of Pupils (EP):**

The low rate of pupil attendance continues to be a serious issue in EP. Recent results of the DHS survey indicate EP has one of the highest rates of absenteeism, drop out, and retention in Zambia. Not only is this a detriment to the children's education, when the children are from SHN schools, the sample size of the pilot is reduced.

**High Enrolment Rates (EP):**

Paradoxically, in EP there is also a problem with unexpectedly high enrolment rates, especially in the lower grades, most likely due to the free education policy. The problem this poses for the SHN programme is that the provision of drugs needs to be recalculated and schools need to be revisited to provide more drugs than what were initially provided on the basis of anticipated enrolments.

**Teachers' Strike (EP):**

The ongoing strike of teachers over remuneration issues negatively affected drug administration in some intervention schools this quarter. At the time of writing (early April), the strike appears to have ended.

### **IEC Material Production (Lusaka):**

The IEC consultant, Mr. Gershom Musonda, reported the following constraints: delays in approving radio programmes has created gaps in the overall flow of the material; approval for all publications continues to be slow, creating delays; and the need to constantly borrow equipment (digital camera, video camera, tape recorder) from the CHANGES programme is time-consuming and creates delays in the production of materials.

### **USAID Travel Restrictions:**

The restrictions on travel instated by USAID due to the war in Iraq has introduced uncertainty and delays into implementing the programme. The extension design has been delayed due to the inability to field a foreign consultant, and programme sub-contractors have found it difficult to plan their work and trips to Zambia due to the uncertainties over travel.

## **VI. ANTICIPATED ACTIVITIES (APRIL-JUNE 2003)**

During the next reporting period, the following activities will be started, continued or completed:

### **A. CSMC:**

- During the Quarter, the planned 13 radio programmes on the CSMC, girls' education, and HIV/AIDS will be produced and aired.
- During 6-30 April, the research and verification will be conducted in Mazabuka District, the seventh district to come on board the CSMC.
- ZCFs from Gwembe District will be trained in early April.
- District Stakeholders Meetings will be held mid-April in Livingstone, Kazungula, and Sinazongwe to review progress and issues at the district level.
- During early May, District Stakeholders' Meetings will be held in Choma and Kalomo to review progress and resolve issues at the district level.
- ZCFs from Mazabuka District will be trained in mid-May.
- The three-day Sinazongwe Review Workshop for ZCFs will be conducted during the third week of May.
- Entry into Namwala and Itezhi Tezhi Districts will be made and sites for research and verification will be determined in late May. (The two districts will be dealt with together because of their sparse populations.)
- Research and verification will commence in Namwala and Itezhi Tezhi Districts in early June.
- A Provincial Stakeholders' Meeting will be held on 18 June. (In the previous meeting, it was decided to hold these meetings quarterly.)

- Monitoring of the work in all participating districts will continue on a regular basis throughout the quarter.

## **B. SHN:**

- A re-infection mini survey of approximately 400 pupils will be conducted during 7-12 April.
- Selected teachers, health workers, and district officials from all districts of Lusaka and Central Provinces (10 districts total) will be trained in SHN Administration as the SHN programme expands into those two provinces.
- Pilot testing and training for establishing the SHN MIS (Management Information System) will be completed during April in collaboration with external consultants. A monitoring system for the MIS will also be put in place.
- All new control schools will be visited to brief teachers on SHN activities, to establish SHN committees, and to collect relevant data for when those schools are converted to intervention schools.
- The School Health Card will be revised.
- Production of the 26 SHN radio programmes to be aired on Radio Breeze will be produced; some will be aired.
- All SHN schools will be monitored using the recently developed monitoring instrument.
- International travel permitting, a meeting will be convened in Lusaka to disseminate the findings from the September 2002 survey in EP. Both the biomedical and cognitive assessment findings will be presented and discussed by the programme's external consultants.

## **C. HIV/AIDS:**

- In EP, a survey of Anti-AIDS clubs will be conducted to determine needs and relevant avenues of support.
- In EP, a meeting will be convened to debrief researchers and counselors on the findings of the operations research on the linguistic dimensions of HIV/AIDS counseling that was conducted during the latter half of 2002.
- The EP HIV/AIDS Editorial Committee will meet to revise the locally produced teaching materials (for Grades 1-7) that were developed last year in a materials development workshop.
- The HIV/AIDS impact assessment on the education sector, spearheaded by SIAPAC and the MOE, will continue throughout the quarter. Most of the field data will be collected during April through June.

#### **D. Small Grants Mechanism:**

- The process of grant making, including establishing District Steering Committees, monitoring existing grants, awarding new grants, and documenting the impact of the small grants will continue in both EP and SP.

#### **E. IEC:**

- Information will be collected from Eastern, Luapula, Lusaka, Northern, and Southern Provinces on SHN activities.
- English language SHN radio programmes will be produced and aired.
- Production of local language SHN radio programmes will be resumed.
- Work will continue on producing and airing the 13-part Tonga language CSMC radio programmes.
- The CSMC District Profiles for Choma and Livingstone will be finalized, printed, and disseminated.
- If possible, a training course in IEC production will be delivered to the CSMC team and the SP MOE.

\* \* \*

**Appendix A -  
SIAPAC Inception Report**



# SIAPAC Inception Report

## Background

In 2002 the Ministry of Education (MOE) advertised for tenders for assistance to conduct an impact assessment of HIV/AIDS on the education sector. The tender was won by the Namibian-based firm Social Impact Assessment and Policy Analysis Corporation (SIAPAC). In October, 2002, final negotiations were held between MOE and SIAPAC, and the proposal revised and submitted as a final on 31 October, 2002. Thereafter the contracting mechanism was worked out between the donor, the United States Agency for International Development (USAID), and MOE. The Contract was duly finalised in late January, 2003, and signed in final form on 31 January, 2003. Work began on 1 February, 2003.

In its proposal SIAPAC recommended that an Inception Report be prepared that would provide details of the way forward, and note any changes in approach or activities arising from the start-up of the investigation. This Inception Report was due one month after project start-up, 1 March, in draft form. It is intended that this will be reviewed by the Client during the first two weeks of March, following which SIAPAC will meet with the Working Group and thereafter the Reference Group to finalise the document. It is expected that the document will be finalised immediately after a 17 March Reference Group meeting.

## Introduction

The Terms of Reference listed out specific activities to be carried out as part of the Impact Assessment of HIV/AIDS on the Education Sector. The purpose of the Impact Assessment was “To assist the Ministry of Education, Zambia to develop a baseline tool for evidence based educational planning and management to counter the impact of HIV/AIDS on the sector. The final report will reflect:

- the current and projected scope and levels of impact of HIV/AIDS on education in Zambia;
- the opportunities for concerted action, in terms of institutional response, service provision to learners and the role of the education sector in responding to the epidemic.”

Areas to be considered included:

1. Supply of education.
2. Demand for education.
3. Educational costs associated with the HIV/AIDS epidemic.
4. HIV/AIDS impacts on the quality of education.
5. The role of the education sector in the response to the epidemic.
6. The differential gender impacts of the epidemic, and how this affects their education.

## **Activities**

The team mobilised in the first two weeks following contract signature, during which time initial contacts were made with the Client and the information needs, procedures, and activities were discussed. On 18 February the external team arrived in Lusaka for two weeks and work began in full. During this period the following was accomplished:

- Meetings were held with a number of individuals and organisations, with most interviews concentrated at MOE (the list will be included in Progress Report 1, to be submitted on 1 April).
- Extensive internal team meetings were held to discuss strategies and the way forward.
- Initial list of organisations to be visited listed in detail (see draft documents in Annex A).
- The draft plan of action was developed (see Annex B).
- Other correspondence was received (see Annex C).
- The first Reference Group meeting was held. Minutes will be included in Progress Report 1.

Through these activities, the team considered the way forward, and discussed this with the Reference Group. This Inception Report presents information on key decisions made at the Reference Group meeting, as well as issues raised through other activities.

## **Issues for Consideration**

As noted above, there are six key areas to be investigated: supply; demand; cost; quality; gender; and the role of education in responding to the epidemic. These issues will be outlined in detail in Progress Report 3, by which time most of the documents and data will have been obtained to determine what data are available, and what can be done with it. In this regard, it should be highlighted that the quality of the projections associated with supply, demand, quality, costs, and gender is dependent on the quality of the data available. If, for example, pupil numbers by grade by age by sex are not known or not retained on a database for many years, the ability to consider enrolment trends and possible HIV/AIDS impacts will be considerably undermined.

### Supply

Briefly, the supply of education was defined as including teachers and other educators, as well as administrative and manual labour in the Ministry of Education. In terms of the Impact Assessment, education is defined as including pre-school education, primary school, junior secondary and senior secondary school, university and vocational training. For modelling purposes, supply of education by others (e.g., non-formal education in agricultural techniques offered by agricultural extension officers) will not be considered.

### Demand

The demand for education refers to the number and distribution of children who are of school-going age that need access to schooling. The number of children who will need to be accommodated by the system will be affected by demographic changes arising from AIDS deaths, where fertility rates decline as women die before having the expected number of

children, and as some children are born HIV positive and die (normally within the first two years).

Beyond the demographic impacts, a number of other factors also affect demand for education, including the inability to pay for education, children being withdrawn from school for the short- or long-term to provide labour (e.g., for agriculture, for caring for the sick, etc.), movement of orphan children from one area to another, etc.

### Costs

The major costs associated with the HIV/AIDS epidemic and its impacts on the education sector revolve around pension payouts, medical costs, and teacher training, as well as costs associated with increased repetition and drop-out. These costs will be investigated. There are also less easily measurable costs associated with lost time due to illness, attending funerals, etc. that will be investigated.

In addition to considering costs associated with impacts, costs related to responding to the epidemic would also be considered. This would include counselling and testing and the provision of anti-retroviral drugs, needed interventions, and other costs. The costs would be compared to offset savings (e.g., teacher training costs would increase at a slower rate).

Finally, there are a number of issues around the affordability of schooling for households, including the opportunity costs surrounding the labour of those of school-going age, and related costs that will be investigated.

### Quality

While less tangible than many of the measures discussed above, the quality of education is often severely impacted by HIV/AIDS. Quality problems arise in terms of supply and demand:

- Increased teacher and educator absenteeism affects service delivery. If teachers are ill, classes may be cancelled for many days, or classes may be merged, dramatically increasing class size. If other educators are ill, services provided to schools and throughout the education system are undermined. These impacts on education quality will be measured, to the extent that data can provide relevant information.
- As teacher shortages increase due to AIDS deaths, it is unlikely that posts can be filled by trained teachers. Teachers with lesser qualifications may therefore need to fill posts, particularly in poorer areas that have difficulty in attracting quality teachers, having both quality and inequality implications.
- Household impacts will undermine the ability of pupils to access education. Young girls in particular may be required to leave school for short periods of time to care for the sick and dying, and to replace domestic labour. This would likely result in poorer performance at school, and an increased likelihood of repetition. With AIDS deaths, this may become a more permanent problem, with girls dropping out. Young boys may also be affected by the need to replace lost labour associated with household labour loss in the fields, in small enterprises, and for tending livestock. In some cases, young girls and boys may end up running households, with consequent impacts on the ability of household members to attend school. Over time, younger children will be less likely to attend school at all.

- With repetition, the percentage of overage learners in the system will increase, further undermining education quality.
- The local economic impacts of HIV/AIDS on households undermines local contributions of resources and labour to school projects, undermining the expansion of physical infrastructure and overall quality of education, as fewer innovative projects (e.g., school gardens, building classrooms, etc.) take place.

### Gender

As noted above, HIV/AIDS does not affect girls and boys, and women and men the same. Women tend to be infected at a younger age, and bear the brunt of caring for the sick and dying and the children who remain behind. They are also more likely to replace lost labour in the household. They are also less likely to be employed and therefore vulnerable to the loss of an employed person in the household. With regard to enrolment, there are already problems with female access to education at various levels, something which Zambia has spent considerable time and resources trying to reverse. HIV/AIDS will worsen female access to education in particular, as households make decisions about the use of scarce resources and the likely value of educating a boy versus a girl.

### The Role of Education in the Response

There is no other sector in Zambia that has such high access to the population that is currently HIV *negative* as education. Yet these are the same young people who are at highest risk of HIV infection. Education therefore has a central role to play in reaching this population. This places a considerable burden on the sector to respond, from Information, Education and Communication interventions, to the emergence of Behavioural Change Communication approaches, to encouraging the school to act as a locus for community interventions (including NGOs, CBOs, faith-based organisations, etc.), to curriculum reform, to reproductive health counselling, etc. These would be investigated, depending on the quality of data obtained.

In addition, there is a need for the education sector to respond to the impacts of the epidemic on the sector itself. An effective workplace response that includes, for example, Behavioural Change Communication, access to condoms, voluntary counselling and testing facilities, access to anti-retroviral drugs (including for pregnant women within the sector), and related possible interventions. Activities would also include curriculum reform and interventions at teacher training institutions. These would be investigated, again depending on the quality of data obtained.

### **Approach**

Following the first meeting of the Reference Group on 24 February, 2003, the approach was finalised, consistent with the Terms of Reference. The way forward suggested by the Consultants is as follows, and is subject to discussions for finalisation of the Inception Report:

- Appointment of a full time Data Collection and Storage Manager for a period of 6 months, with a possible extension of 2 months.
- Collection of data, reports, and other information from a number of sources associated with education and/or HIV/AIDS in the Lusaka area.

- Numerous interviews with organisations active in the education and/or HIV/AIDS fields in the Lusaka area.
- Review documents, including policy documents.
- Fieldwork in five provinces: Lusaka; Copperbelt; Southern; Central; Eastern. Field activities will include key informant interviews, classroom visits and discussions, and small group discussions with educators and pupils, as well as key informant interviews at the district and provincial level. Qualitative approaches would be employed, although for the subset of schools some quantitative measures would be employed.
- Modelling the epidemic at the national and provincial levels.
- Modelling the epidemic on educators by level. Through this establish, to the extent possible, impacts of HIV/AIDS on supply and demand in the education sector.
- Establish, to the extent possible, impacts on the quality of education.
- Estimating costs of the epidemic.
- Monthly Working Group meetings to discuss progress reports.
- *Ad hoc* Working Group meetings to discuss issues and progress.
- Reference Group meetings to discuss issues and progress.

A draft Plan of Action has been included to provide more detail on these activities (see Annex B).

### **Other Issues Arising**

#### OraSure Saliva Survey

At the 24 February, 2003 Reference Group meeting, the idea of an OraSure saliva survey was discussed. SIAPAC noted that conducting such a survey would add significantly to the information base for proper Impact Assessment, improving the accuracy of the projections. It would also provide baseline data against which project impacts could be measured.

In considering the feasibility and desirability of the OraSure Saliva Survey, if it was expected that the OraSure saliva test would take place *prior to* modelling, then the Impact Assessment could be delayed by up to a year, perhaps longer. SIAPAC offered a second alternative to the Reference Group, that between now and the end of the year the Ministry, with SIAPAC assistance, would consider how to prepare the education population for such a survey, and that the survey take place in 2004. At the same time as these preparations were underway, the Ministry would need to submit a detailed plan to the Medical Ethics Board to secure permission for the testing. This, it was felt, would take some six months, perhaps longer.

To provide relevant background information to help in making a decision, originally the idea of a saliva survey was raised in discussions that were held between two consultants working in the health and agricultural sectors in Zambia and SIAPAC, based on a suggestion from USAID/Zambia. Subsequently SIAPAC made further informal enquires into the efficacy of such a survey with the Center for Disease Control and Prevention (CDC), whom SIAPAC was working with on an AIDS project in Namibia. Further discussions were held with a demographer SIAPAC is working with in Lesotho, where an OraSure saliva survey is about to get underway. Additional discussions were held with technical specialists in the HIV/AIDS area, including in Zambia. The conclusions drawn from these discussions are as follows:

- The efficacy of the survey is extremely high, yielding almost 100% reliable measurement. Problems emerge generally with extreme mishandling of samples. These problems can be overcome through careful management, and following technical protocols. Testing can be decentralised, and samples last for at least a week if properly handled.
- With proper preparatory work, refusal rates could be as low as 10%, perhaps even lower. Refusals could be accounted for via weighting the data if non-cooperation is patterned. If refusal rates are higher, adjustments would have to be made to accommodate biases, to the extent possible.
- Ethical protocols have been developed for ensuring the confidentiality of the test results, and these could be employed in the survey of educators. Technical assistance may best be solicited from the CDC in this regard. Further, CSO in Zambia has previous experience with regard to saliva testing, and could have an important role to play in any such survey.
- Facilities for processing the samples are available in Zambia, at a cost, with arrangement.
- The OraSure survey would be best implemented along with a sexual Knowledge, Attitudes and Practices (KAP) survey. This would provide an excellent baseline of sexual KAP, and also a benchmark against which the success of various interventions could be measured. Given that the testing would require that a random sample of educators be visited, the additional costs associated with a KAP study would be relatively small.

If such a survey is to proceed, once the survey was conducted and data were made available, the modelling done in 2003 by SIAPAC could be revised in light of the OraSure saliva test results, and impacts adjusted to account for this. A revised Impact Assessment report would then be prepared. Further, the revised Impact Assessment report would include detailed consideration of the sexual KAP survey (a detailed KAP survey report would also be issued). It should be noted that SIAPAC will be involved in OraSure saliva testing in other countries in the SADC region during 2003 (as will Dr. Kinghorn from HDA), and will be able to consider lessons learned for the Zambian project. There will also be lessons learned from the USAID-sponsored activities in the health and agricultural fields.

The Reference Group agreed that SIAPAC should proceed with considering the viability of such a survey, and that the Ministry itself would make initial enquiries into ethical issues associated with the OraSure Salvia Survey, and would consider the overall issue further. This issue will therefore be reported on in Progress Reports as more information becomes available.

#### Suggested CSO Field Involvement

At the 24 February, 2003 Reference Group meeting, a representative from CSO noted that experienced field officers might be available from CSO, at cost, for the fieldwork. SIAPAC discussed this among its team, and it was felt that it would be best to directly hire own personnel due to the fact that this would allow the Consultants to control the availability of field officers, and further because competent officers had already been screened. This decision will therefore be communicated to CSO.

Despite this decision, SIAPAC would like to thank the CSO for discussing this possibility, and look forward to working with them throughout the Impact Assessment.

## **Annexes**

Annexes are attached.

## **Annex A: Initial Listing of Organisations to be Visited**

### **Ministries, Organisations and Institutions to Visit**

#### **Ministries**

##### ***Ministry of Education***

###### *Directorate of Human Resources and Administration*

Professional Management Scale Staff  
Accounts and Internal Audit Unit  
Inspectorate Unit  
Procurement and Supplies Unit  
Hubert Young Unit  
Bursaries Committee  
Zambia National Commission for UNESCO  
Non-civil Servants

###### *Directorate of Planning and Information*

Professional Management Scale Staff  
Budget, Projects and Programmes Sections  
Planning and Research Section  
Buildings Section  
Information Systems Section  
Statistics Section  
Non-civil Servants

###### *Directorate of Standards and Curriculum Development*

Education Management Scale Staff  
Curriculum Development Section  
Standards and Evaluation Section  
Non-civil Servants

###### *Directorate of Teacher Education and Specialised Education Services*

Education Management Scale Staff  
Teacher Education Section  
Specialised Education Services Section  
Special Education Unit  
Schools Guidance and Counselling Services Unit  
Non-civil Servants  
National Science Centre  
Non-civil Servants  
Zambia Library Unit  
Education Boards Services Section  
Non-civil Servants



*Directorate of Distance Education*

Education Management Scale Staff

Education Broadcasting Services Section

Open Learning Section

Non-civil Servants

Correspondence Studies Section

Non-civil Servants

*Provincial Education Office: Copperbelt Province*

*Provincial Education Office: Lusaka Province*

*Provincial Education Office: Central Province*

*Provincial Education Office: Northern Province*

*Provincial Education Office: Eastern Province*

*Provincial Education Office: Western Province*

*Provincial Education Office: North Western Province*

*Provincial Education Office: Luapula Province*

*Provincial Education Office: Southern Province*

*EMIS*

***Ministry of Health***

Dr Sinyinza, HIV/AIDS Person, MOH

Mr Kaliki, Health Management Information System, MOH

Mr Sikateyo, Information and Research Specialist, MOH

Director, Directorate of Planning and Development

Director, Directorate of Health Policy

***National AIDS Council***

***Ministry of Community Development Social Services***

Director, Department of Social Welfare

Director, Department of Community Development

Director, Department of Cultural Affairs

***Ministry of Sport, Youth and Child Development***

Youth Affairs Department

Child Development Department

Self Project

### **Donor Agencies**

UNICEF  
UNDP  
WHO  
UNAIDS  
USAID  
Social Development Officer - Embassy of Sweden  
Ireland Aid  
Programme Officer - Royal Norwegian Embassy  
UNESCO  
UNFPA  
World Vision

### **Non-Governmental Organisations**

CARE International - Lusaka  
CARE International - Livingstone  
Catholic Diocese - Ndola  
Commonwealth Youth Programme Africa Centre - Lusaka  
Community Youth Concern - Lusaka  
Copperbelt Health Education Project - Kitwe  
Family Health Trust - Lusaka  
Family Life Movement - Lusaka  
Fatima Girls High School - Ndola  
Hope Humana - Ndola  
Society for Family Health - Lusaka  
Society for Family Health - Livingstone  
YMCA - Lusaka  
ZIHP Community Partnership - Livingstone

### **Community-Based Organisations**

### **Individuals and Research Organisations**

Tropical Disease Research Centre (TDRC) in Ndola  
Prof Kelly next to the University of Zambia

**Appendix B -  
SIAPAC Progress Report #1**

# **SIAPAC Progress Report #1**

## **1 Introduction**

This Progress Report covers progress made on the Impact Assessment of HIV/AIDS on the Education Sector in Zambia from the period 1 February - 20 March, 2003 (covering mobilisation and the inception phase). It is structured as follows:

- Section 1: Introduction
- Section 2: Executive Summary
- Section 3: Record of Activities
- Section 4: Planned Activities
- Section 5: Matters Arising
- Section 6: Draft Outline of the Report
- Section 7: Other
- Section 8: Conclusions and Lessons Learned
- Annexes

## **2 Executive Summary**

The period covered by Progress Report 1, 1 February - 20 March, 2003, saw mobilisation for the Impact Assessment, meetings with the Steering Committee and the Working Group to guide the assessments, the full team's visit to Lusaka, the hiring of the Data Collection and Control Manager, and preparation of the Inception Report and minutes from meetings. The key lessons learned during the reporting period comprised the following: 1) MOE is clearly committed to the Impact Assessment, and has endeavoured to help in a number of ways; 2) HIV data for Zambia are quite good, and include a population-based sample survey to establish prevalence (carried out in 2000); 3) EMIS data are limited in terms of the years captured electronically, and this may raise problems for effective modelling; 4) it is difficult to secure appointments and obtain relevant materials, and there are increased concerns about accessing cost data; and 5) a qualitative approach to the fieldwork will yield more insights into the impacts of the HIV/AIDS epidemic on the education sector, and will also help the team to consider what responses seem to work and why.

### 3 Record of Activities

The following activities were carried out during the reporting period:

- Initial team visits involving Dr. Cownie and Mr. Mouton to finalise all contracting issues and mobilise for the project in January.
- Multiple entry visas were secured for the external team members.
- A full team visit involving the Team Leader, Dr. Otaala, as well as Dr. Cownie, Mr. Mouton, and Dr. Kinghorn took place in February. Also signalled the mobilisation of the local consultancy firm JUDAI, and appointment of Ms. Ponga-Yashini as Data Collection and Storage Manager.
- An office was kindly made available to the Consultants within the CHANGES Project Office in Lexi House, Addis Ababa Circle, Lusaka. This included a phone line and coverage for calls made within Zambia, a photocopier, and access to CHANGES equipment where accepted by CHANGES. The Project Office was subsequently established, a computer and printer purchased, other inputs procured, and a petty cash system put into place.
- Monthly workplans for the office were set into motion with the preparation of the March workplan.
- Two Steering Committee meetings were held, and two Working Group meetings were held.
- An explanation of the provision of Deliverable 1 was provided to CHANGES in a letter dated 18 March (see Annex B).
- An estimated 75+ calls were made to 27 organisations to secure appointments, of which 22 appointments were made and 15 conducted. Seven were scheduled but were not conducted due to the absence of the interviewee. The list of organisations contacted and to be contacted (which is not exhaustive) is included as Annex C.
- 122 documents were collected for use in the assessment. The list of documents collected to date are attached as Annex D.
- Dr. Cownie visited Lusaka from 19-20 January, 19-26 February, and 17-22 March.
- Mr. Mouton visited Lusaka from 19-23 January, and 17-28 February.
- Dr. Otaala visited Lusaka from 19-28 February.
- Dr. Kinghorn visited Lusaka from 19-25 February.
- JUDAI was appointed as sub-consultant to SIAPAC in February.
- Ms. Ponga-Yashini was appointed on 27 February.
- The Inception Report was prepared in draft form, discussed with the Working Group and submitted as a Draft Final Version on 24 February, and finalised on 18 March after presentation to the Steering Committee on 17 March. It included background information, an overview of the Terms of Reference, a list of Activities carried out from start-up, Issues for Consideration (supply, demand, costs, quality, gender, role of education), the proposed Approach, and discussion of Other Issues Arising. These other issues comprised consideration of an OraSure Saliva Survey and Suggested CSO Field Involvement. Annexes included an initial listing of organisations to be visited to obtain information and conduct interviews, a draft plan of action, and correspondence.
- Minutes were prepared and circulated of the two Steering Committee meetings and the two Working Group meetings.
- Progress Report 1 was prepared.

## **4 Planned Activities**

For the upcoming reporting period of 21 March - 13 April, the following is expected to be accomplished:

- Completion of field instruments.
- Hiring of field officers and the field co-ordinator.
- Training of field officers.
- Pre-testing field instruments.
- Securing field equipment and vehicle hire.
- Presentation of Progress Report 1 (Drs. Otaala and Cownie).
- Preparation of Working Group minutes for the meeting at which Progress Report 1 will be presented.
- Discussions with the Center for Disease Control and Prevention (CDC) in Lusaka.
- Continued securing and review of educational materials, preparation of an overview of the sector for the team and comments on possible points of vulnerability based on the Table of Contents (Dr. Otaala). (Note: this will continue for the Progress Report 3 period as well.)
- Expected visits: Dr. Cownie 3-5 April, 14-15 April (the latter just after completion of the reporting period); Mr. Mouton 27 March - 5 April; Dr. Otaala 3-9 April.
- Preparation of Progress Report 2.

## **5 Matters Arising**

### **i. Scheduled Activities**

The Consultants prepared a schedule during the reporting period that including speeding up field data collection and other activities, so that the study could proceed as quickly as possible.

*Issue Arising:* Consequent financing implications regarding reallocating payments within the total budget were raised with CHANGES, the Contractor.

### **ii. Field Approach**

With the start-up meeting of the full team, it was felt that qualitative approaches to field data collection were required. This was presented in the Inception Report and discussed in two Steering Committee meetings, wherein the Client agreed with the proposed approach. The field approach includes key informant interviews, focus group discussions, knowledge and attitude questions to pupils, and one-on-one interviews with pupils and educators.

Five provinces were selected: Lusaka; Southern; Central; Copperbelt; and Eastern. Within each, two districts will be selected in consultation with the provinces and with MOE headquarters. Each district is expected to take one team one week to complete. A expected total of five schools will be visited within each district, giving an expected total of fifty schools altogether.

*Issue Arising:* Review of field instruments and provision of comments to the Consultants by 2 April at the latest. Assistance with selection of districts.

### **iii. OraSure**

The possibility of establishing HIV prevalence and conducting a linked sexual knowledge, attitudes and practices survey to give baseline information from which to measure change and intervention impacts was discussed.

*Issue Arising:* Dr. Cownie will be collecting additional information to prepare a brief on the possible OraSure Saliva Survey, including possibly piloting a survey late in 2003. The queries will fall within the reporting period, but the response will not come until a later reporting period.

## **6 Draft Outline of the Report**

This is included in Annex A.

## **7 Other**

No other issues to report.

## **8 Conclusions and Lessons Learned**

Project Mobilisation began in earnest following delays arising from shifts in the nature of the original contracting facility. The Impact Assessment officially began on 1 February, 2003. Items were 'fast-tracked' to the extent possible so that the Impact Assessment could be completed as quickly as possible. This was, of course, only possible for those elements under the control of the Consultants. In particular, it is unlikely that it will be possible to 'fast-track' calculations associated with the costs of the epidemic. Overall, the Impact Assessment has gotten off to a quick start thanks to the considerable efforts of the Ministry of Education, and the logistical, contractual and office support offered by CHANGES.

*Lesson Learned 1:* The Client MOE and the Contractor CHANGES have shown sufficient flexibility to allow important aspects of the programme to be accelerated.

Information/document collection has begun.

*Lesson Learned 2:* It is likely that the Consultants are only securing part of the documentation and information they require. A careful review of the list is therefore required from the Client, so that gaps can be filled.

Access to people for interviews has been somewhat problematic, although not as bad as expected.

*Lesson Learned 3:* None, unfortunately this was expected.

EMIS data are limited in terms of the years captured electronically, and this may raise problems for the modelling. This will be considered further by Mr. Mouton during his scheduled March-April visit. Fortunately, HIV prevalence data appear to be quite good, which should help with modelling the national and provincial epidemics.

*Lessons Learned 4:* Considerable attention will need to be devoted to trying to secure electronic data for the 1990s (and, if possible, the mid- to late-1980s).

A qualitative approach to fieldwork was approved by the Steering Committee. The Consultants believe that this will yield the information required for the Impact Assessment.

*Lesson Learned 5:* If EMIS data are limited, the importance of carrying out an OraSure Saliva Survey is heightened.

Discussions have been held about the possibility of implementing an OraSure Salvia Survey.

*Lesson Learned 6:* Any decision on whether to proceed with an OraSure Saliva Survey would need to be based on a careful consideration of the feasibility of such a survey in light of the benefits it might offer. Benefits include: 1) baseline HIV prevalence data from which to measure change over time and possible intervention impacts; 2) baseline knowledge, attitudes and practices data (which are also linked to HIV incidence) from which to measure change over time and possible intervention impacts; 3) significantly more accurate HIV prevalence data (that is, instead of assuming similar prevalence for educators and others in the same age groups, obtain actual prevalence data) and significantly more accurate remodelled data considering demographic impacts; 4) updated (2004) projections based on remodelling; 5) a vehicle for helping to build a stronger response to the epidemic; 6) an updated Impact Assessment report to accommodate the revised data; and 7) a strengthened process of consultations with MOE to consider intervention strength and weaknesses, and assess progress to date and challenges remaining.



## **Annex A: Draft Table of Contents**

The following is an initial attempt at preparing draft Table of Contents for the full report. It should be noted that it will change during the process of report preparation and discussions with the Client.

Foreword by the Minister of Education  
Preface by the Permanent Secretary, Ministry of Education  
Statement from the National AIDS Council  
Acknowledgements  
Table of Contents  
List of Tables  
List of Figures  
List of Maps  
List of Abbreviations  
Glossary of Terms  
Map of Zambia - Showing Its Position in Africa  
Map of Zambia - Showing Provinces and Districts  
Map of Zambia - Showing Location of Provincial and District Educational Offices  
Provincial Maps of Zambia (x9) - Showing Locations of Schools by Level  
Organogram of the Ministry of Education and Staff Complement

**Executive Summary: Key Findings and Recommendations** (10-15 pages)

**Executive Summary: MOE Workshop Plan of Action**

*The following summaries would be included in an Annex:*

**Summary: Key Issues for the HIV/AIDS Unit** (15-20 pages)

**Summary: Key Issues for Policymakers in the Ministry of Education** (2-3 pages)

**Summary: Human Resources** (4-5 pages)

**Summary: Teacher Training** (4-5 pages)

**Summary: Costings** (inc. response) (4-5 pages)

### **Chapter 1: Introduction**

Introduction

Statement of the Problem

Outline of Impact Arenas of HIV/AIDS on the Education Sector

Rationale

Aims and Objectives of the Study

Methodology and Approach

Introduction

The Impact Assessment Process

Level and Nature of Client Involvement

Benefits of the Approach

Intended Outputs and Outcomes

Procedures

Limitations

Summary

## **Chapter 2: Background and Context**

Introduction

Context

HIV/AIDS in Zambia

Statement of the Problem

Response to the Problem

Structures

Economy, Poverty and Human Development

Impact of HIV/AIDS on Social Development

Societal Impacts

Household Impacts

Impact of HIV/AIDS on Economic Development

Macro-Economic Impacts

Household Economic Impacts

The Education System in Zambia

Background and Introduction

Key Issues in the Education Sector

Changes Over Time

Gender and Education

Overview of the Educational System in Zambia

Introduction

Primary Education

Secondary Education

Post Secondary Education

Teacher Training

Pre-Primary Education

Other

Gender and Education

Overview of Educational Performance in Zambia

Introduction

Primary Education

Secondary Education

Post Secondary Education

Teacher Training

Pre-Primary Education

Other

Gender and Education

Summary

## **Chapter 3: Impacts of the AIDS Epidemic on the Education Sector: Demand**

Introduction

Limitations of the Data

Demand

Estimating Demand

Demand for Primary Education (by grade)

Demand for Secondary Education (by grade)

Demand for University Education (by level)

Demand for Teacher Training

Demand for Pre-Primary Education (by age of child 3-5)

Gender and Demand Issues

## Summary

### **Chapter 4: Impacts of the AIDS Epidemic on the Education Sector: Supply**

#### Introduction

#### Limitations of the Data

#### Supply

##### Estimating Supply

##### Primary School

###### Teacher Supply

###### Pupil:Teacher Ratio Impacts

##### Secondary School

###### Teacher Supply

###### Pupil:Teacher Ratio Impacts

##### University

##### Teacher Training

##### Pre-Primary

##### Educators

###### District

###### Provincial

###### National (by professional arena)

##### Gender and Supply Issues

## Summary

### **Chapter 5: Impacts of the AIDS Epidemic on the Education Sector: Quality**

#### Introduction

#### Limitations of the Data

#### Education Quality

##### Introduction

##### Factors Affecting Demand for Education

##### Factors Affecting the Supply of Education

##### Factors Affecting the Ability of the Education Sector to

###### Respond to the Epidemic

##### Gender and Education Quality Issues

## Summary

### **Chapter 6: Impacts of the AIDS Epidemic on the Education Sector: Costs**

#### Introduction

#### Limitations of the Data

#### Costs

##### Introduction

##### Parameters

##### Educational Costs

##### Cost Increases Due to Increases in Repetition

##### Costs Associated with Drop-Outs

##### Additional Costs Arising for Teacher Training

##### Sick Benefits

##### Death Benefits

##### Cost Summary

##### Gender and Cost Issues

## Summary

## **Chapter 7: The Role of the Education Sector in Responding to the Epidemic**

Introduction

The National Response

Policy

Programming

Interventions

Actors

Current HIV/AIDS Programming in the Education Sector

Workplace Response

Curriculum

Outreach

Potential Response Arenas

Workplace Response

Opportunities

Constraints

Resource Requirements by Options

Curriculum Response

Opportunities

Constraints

Resource Requirements by Options

Outreach Response

Opportunities

Constraints

Resource Requirements by Options

Best Care Scenarios

Workplace Response

Curriculum Response in the Context of the National Response

Outreach Response in the Context of the National Response

Summary

[Annexes are likely to be included in a separate volume]

**Annex A: Terms of Reference and Adjustments Thereto**

**Annex B: Workshop Report and Workplan Plan of Action**

**Annex C: Discussion of Modelling and Projections**

**Annex D: Detailed Modelling Findings**

**Annex E: Field Instruments**

**Annex F: Secondary Executive Summaries**

**Annex G: Bibliography**

**Annex H: List of People and Organisations Interviewed/Consulted**

## **Annex B: Statement of Deliverables for Deliverable 1**

**TO:** Dr. Ed Graybill, CHANGES Project  
**FROM:** Dr. David Cownie, SIAPAC  
**RE:** Deliverables 1  
**DATE:** 18 March, 2003  
**REF:** Impact Assessment of HIV/AIDS on the Education Sector in Zambia

As per our contract, the following were delivered, and delivered in the following manner:

Deliverable: “Record of decisions that specify operational definitions and details describing the ‘six dimensions’, and any additional dimensions, that will comprise the focus of the study, including the impact of HIV/AIDS on the:

- a) supply of education
- b) demand for education
- c) cost of education
- d) process and quality of education
- e) content and role of education
- f) gender disparity
- g) any other agreed upon theme”

Manner of Delivery:

1. Inception Report (draft submitted on 24 February, final on 18 March)
2. Minutes of the first Steering Committee meeting of 24 February.
3. Minutes of the second Steering Committee meeting of 17 March.

Deliverable: “Minutes of initial meetings with the MOE supervisory team and other organizations that provide a record of discussions and a list of any additions or changes in the major themes (above), operational definitions of key terms under each theme, and suggested documents, resource persons, or organizations who should be consulted regarding each of the dimensions.”

Manner of Delivery:

1. Inception Report (draft submitted on 24 February, final on 18 March), including annexes
2. Minutes of the first Steering Committee meeting of 24 February.
3. Minutes of the second Steering Committee meeting of 17 March.
4. Minutes of the Working Group meeting of 20 January
5. Minutes of the Working Group meeting of 18 February

Deliverable: “Presentation of draft Inception Report to MOE supervisory team. Submission of final Inception Report”.

Manner of Delivery:

1. Draft Inception Report submitted on 24 February, discussed with Steering Committee.
2. Final Inception Report discussed with Steering Committee on 17 March, submitted on 18 March.

## **Annex C: List of Organisations Contacted/Interviewed or to be Contacted/Interviewed**

### **Ministries, Organisations and Institutions to Visit**

#### **Ministries**

##### ***Ministry of Education***

###### *Directorate of Human Resources and Administration*

Professional Management Scale Staff

Accounts and Internal Audit Unit

Inspectorate Unit

Procurement and Supplies Unit

Hubert Young Unit

Bursaries Committee

Zambia National Commission for UNESCO

Non-civil Servants

###### *Directorate of Planning and Information*

Professional Management Scale Staff

Budget, Projects and Programmes Sections

Planning and Research Section

Buildings Section

Information Systems Section

Statistics Section

Non-civil Servants

###### *Directorate of Standards and Curriculum Development*

Education Management Scale Staff

Curriculum Development Section

Standards and Evaluation Section

Non-civil Servants

###### *Directorate of Teacher Education and Specialised Education Services*

Education Management Scale Staff

Teacher Education Section

Specialised Education Services Section

Special Education Unit

Schools Guidance and Counselling Services Unit

Non-civil Servants

National Science Centre

Non-civil Servants

Zambia Library Unit

Education Boards Services Section

Non-civil Servants

*Directorate of Distance Education*

Education Management Scale Staff

Education Broadcasting Services Section

Open Learning Section

Non-civil Servants

Correspondence Studies Section

Non-civil Servants

*Provincial Education Office: Copperbelt Province*

*Provincial Education Office: Lusaka Province*

*Provincial Education Office: Central Province*

*Provincial Education Office: Northern Province*

*Provincial Education Office: Eastern Province*

*Provincial Education Office: Western Province*

*Provincial Education Office: Northwestern Province*

*Provincial Education Office: Luapula Province*

*Provincial Education Office: Southern Province*

*EMIS*

### ***Ministry of Health***

Dr Sinyinza, HIV/AIDS Person, MOH

Mr Kaliki, Health Management Information System, MOH

Mr Sikateyo, Information and Research Specialist, MOH

Director, Directorate of Planning and Development

Director, Directorate of Health Policy

### ***National AIDS Council***

### ***Ministry of Community Development Social Services***

Director, Department of Social Welfare

Director, Department of Community Development

Director, Department of Cultural Affairs  
*Ministry of Sport, Youth and Child Development*  
Youth Affairs Department  
Child Development Department  
Self Project  
*Central Statistics Office*  
*University of Zambia*  
*Copperbelt University*

#### **Donor Agencies**

*UNICEF*  
*UNDP*  
*WHO*  
*UNAIDS*  
*USAID*  
*Social Development Officer - Embassy of Sweden*  
*Ireland Aid*  
*Programme Officer - Royal Norwegian Embassy*  
*Bert Huenin, First Secretary to the Royal Netherlands Embassy*  
*UNESCO*  
*UNFPA*  
*World Vision*

#### **Non-Governmental Organisations**

*CARE International - Lusaka*  
*CARE International - Livingstone*  
*Catholic Diocese - Ndola*  
*Commonwealth Youth Programme Africa Centre - Lusaka*  
*Community Youth Concern - Lusaka*  
*Copperbelt Health Education Project - Kitwe*  
*Family Health Trust - Lusaka*  
*Family Life Movement - Lusaka*  
*Fatima Girls High School - Ndola*



*Hope Humana - Ndola*

*Society for Family Health - Lusaka*

*Society for Family Health - Livingstone*

*YMCA - Lusaka*

*ZIHP Community Partnership - Livingstone*

**Individuals and Research Organisations**

*Tropical Disease Research Centre (TDRC) in Ndola*

*Prof M. Kelly*

## Annex D: List of Documents Assembled

Name of Document	Author/Programme
2001 BESSIP Annual Progress Report	MOE
A Report on Baseline Assessment for the formulation of a project to support coordinated multi-sectoral HIV/AIDS district response initiatives in Zambia	GRZ and UNDP
A Strategic Plan for Teacher Education in Zambia 2000 - 2015	MOE - Teacher Education Department
AIDS: the greatest leadership challenge	UN
Annual report	WHO
Assessment of UNDP Assistance for a Multi - Sectoral National Response to HIV/AIDS in Tanzania	UNDP Regional Projection on HIV and Development
Basic Education and Policy Support Activity (BEPS)	USAID
BESSIP Mid - Term Evaluation	MOE
Census of Population, Housing & Agriculture 1990: Volume 4 Luapula Province	CSO
Child domestic labour in Lusaka: A Gender Perspective	O. D. Oyaide
Children and young people voice their experiences on gender, sexuality, HIV/AIDS and life skills	MOE/UNICEF
Complement and Gratings of Posts in Ministries and Provinces to Support Estimates of Expenditure for the Year 2002 Personnel and Salary Scales	Public Service Management Division
Coping with common Diseases in Zambia X2	ZAMPAC
Development of health promoting schools in Zambia	CBH/WHO
Draft national Implementation Framework MOE Strategic Plan 2003 - 2007	MOE
ED*ASSIST Primary, Available Data Reports	EMIS
Educating Our Future - National Policy on Education	MOE
Education Studies Syllabus	
Employment Trends 1985 to 1993	CSO
Executive Summary (Gender, Sexuality, HIV/AIDS and Life skills) Research	UNICEF
Girls' Education A situation Analysis at the Provincial level of Girl Education in Zambia	UNICEF/MOE
High lights of the AWPB 2003	MOE
Highlights of 2000 Census Indicators	CSO

HIV/AIDS in Zambia: Background Projections Impacts Interventions	MOH/Central Board of Health
HIV/AIDS Prevention and the Ministry of Education: A Review on Ongoing HIV/AIDS Activities in Schools and Among Youths X2	BESSIP
HIV/AIDS Strategic Plan: 2001 - 2005	MOE
HIV/AIDS/STD/TB Strategic Frame work X 2	National HIV/AIDS/STD/TB Council
Household Budget Survey 1993/1994: Volume 1	CSO
Household Budget Survey 1993/1994: Volume 2	CSO
Indicators on Girls' and Women's Education in Africa	UNICEF
Interactive Methodologies Manual for HIV/AIDS Prevention in Zambian Schools	MOE
Joint evaluation of external support to basic education in developing countries (Draft)	The association of universities and colleges - Canada
Learning Achievement at the Middle Basic Level	MOE
Life Skills Education - Grade 4 Teacher's Guide	MOE/DFID/UNICEF
Life Skills Education - Grade 5 Teacher's Guide	MOE/DFID/UNICEF
Life Skills Education - Grade 5 Pupils Book	MOE/DFID/UNICEF
Literature and Language Education Syllabus	CDC
Living Conditions Monitoring Survey Report 1996	CSO
Living Conditions in Zambia - 1998	CSO
Local action	MOE/WHO/CBH
Lusaka Impact Study "Changes in Contraceptive Use Dynamics after the Introduction of Norplant" Results of the baseline data and first Follow-up	Oliver J. M. Chinganya /CSO
Managing the impact of HIV/AIDS on the education sector	Carol Coome
Mathematics and Science Education Syllabus	CDC
Men and HIV in Zambia	PANOS/UN
Migration and Tourism Statistics: 1992 Report	CSO
Migration and Tourism Statistics: 1993 Report	CSO
National Accounts Statistical Bulletin No. 8: 1965 - 2000	CSO
National Gender Policy	Gender in Development Division
National HIV/AIDS/STI/TB intervention strategic plan	National HIV/AIDS/STD/TB Council

Networks for Development - Lessons learned from supporting national and regional networks on legal, ethical and human rights dimensions of HIV/AIDS	UNDP and UNAIDS
Orphans and Vulnerable Children: A Situation Analysis, Zambia 1999	USAID/UNICEF/SIDA,GRZ
PAGE National workshop for Provincial coordinators	
Participatory Learning Activities for Strengthening teachers' skills to advocate and build support for effective HIV Prevention in schools Serial 3 (X2)	CBH/WHO
Participatory Learning Activities for teacher and adults to reduce their risk for HIV Infection Serial 2 (X2)	CBH/WHO
Primary Education in a Heavily Indebted Poor Country	
Psychological Skills Series - 1st Edition	Lillian Muyunda Byers / Foster Kayungwa
Quarterly Digest of Statistics: Third and Fourth Quarters, 2000	CSO
Quarterly Employment & Earnings Survey Report	CSO
Report on the global HIV/AIDS epidemic	UNAIDS/WHO/UNESCO/UNICEF/UNDP/UNFP A/ILO/WD
Report on the MOE/NGOCC Constitution meeting (Girl child education HIV/AIDS)	GRZ/UNICEF
Report on the Restructuring of the Ministry of Education	Cabinet Office
Response to HIV/AIDS in Zambia 1991 - 2001	UNDP
Rethinking the African AIDS epidemic	John C Caldwell
School Health and Nutrition - News X 3	MOE
School Health and Nutrition and HIV/AIDS - Teachers manual	MOE
School Health Education to Prevent AIDS and STD - A Resource Package for Curriculum Planners: Student's activities	UNAIDS/WHO/UNESCO
School Health Education to Prevent AIDS and STD - A Resource Package for Curriculum Planners: Teacher's Guides X2	WHO/UNESCO
School of Education	University of Zambia
Selected Socio-Economic Indicators 1999	CSO
Selected Socio-Economic Indicators 2000	CSO
Situation Analysis of Policy and Teaching HIV/AIDS Prevention in Educational Institutions in Zambia	Robbie Siamwiza
Six Developmentally Appropriate, Participatory Skills - Building Activities that Teachers Can Use With Pupils and other Young People - Serial 2	Central Board of Health
Six Developmentally Appropriate, Participatory Skills - Building Activities that Teachers Can Use With Pupils and other Young People - Serial 2	Central Board of Health
Six Developmentally Appropriate, Participatory Skills - Building Activities that Teachers Can Use With Pupils and other Young People -Serial 1	Central Board of Health/WHO

Social Dimensions of Adjustment: Priority Survey II 1993 (Tabulation Rpt)	CSO
Social, Moral and Religious Education Syllabus	CDC
Strategic Plan 2003 - 2007	MOE
Technology Studies syllabus	CDC
The AIDS Epidemic in Sub-Saharan Africa: are Teachers a high-risk group	Paul Bennell
The AIDS Pandemic	Richard Willis
The Basic School Curriculum Framework X2	Curriculum Development Centre
The Evolution of Poverty in Zambia 1991 - 1996	CSO
The HIV/AIDS hope initiative	World Vision
The Impact of HIV/AIDS on Education	UNESCO
The Impact of HIV/AIDS on Education in Zambia	MOH
The Impact of HIV/AIDS on Schooling in Zambia	M.J. Kelly
The incidence of child labour in Zambia	CSO
Training and Resource Manual for Education Staff	MOE
Training in Classroom Stress Management for Primary School Teachers	
Training Teachers in Counselling Skills - A Trainer's Manual	MOE
UNAIDS what it does	UNAIDS
United Nations Development Assistance Framework for Zambia	UN, Zambia
Views of Stakeholders Outside the Education Sector on the Basic School Curriculum	MOE - Curriculum Development Centre
What HIV/AIDS Can Do to Education, and What Education Can Do to HIV/AIDS	Kelly - University of Zambia
Women and Men in Zambia: Facts and Figures 1991	CSO
Workshop on Gender Mainstreaming Response to HIV/AIDS among Migrants and others in the SADC Mining, Employment and Labour Sectors	UN (ECA/SRDC-SA)
Zambia 1999 Child Labour Survey	ILO/CSO
Zambia CSO Status News - Issue Number 1	
Zambia DHS 1996	CSO/MOH
Zambia DHS 1996 - Preliminary Report X3	CSO / MOH
Zambia DHS 2001 - 2002 - Preliminary Report	CSO / Central Board of Health
Zambia HIV sentinel surveillance Time trends in the HIV epidemic in the 1990s	CBH
Zambia Human Development Report 1999/2000 Employment & Sustainable Livelihoods	UNDP
Zambia Living Conditions Monitoring Survey Report 1996	CSO
Zambia Sexual Behaviour Survey 1998 with Selected Findings from the Quality of SDT Services Assessment X2	CSO
Zambia Sexual Behaviour Survey 2000	USAID/GRZ/MEASURE Evaluation
Zambia Teacher Education Course	MOE

**Appendix C -  
Statement of Work for the CHANGES Programme Extension Design Team**

## **Statement of Work for the Consultant Team to Design the CHANGES Programme Extension**

4 April 2003

### **Background**

Funded for an initial period of three years (April 1, 2001 – March 31, 2004), the CHANGES programme (Communities Supporting Health, HIV/AIDS, Nutrition, Gender, and Equity Education in Schools) provides technical assistance to Zambia's Ministry of Education (MOE) under the auspices of the Basic Education Sub-Sector Investment Programme (BESSIP). The overall aim of the CHANGES programme is to improve basic education (increase enrolments, especially of girls, and improve the performance of all pupils) in Zambia through the provision of technical support to three of BESSIP's nine components: Equity and Gender, HIV/AIDS, and School Health and Nutrition (SHN).

The CHANGES programme is operational in Southern and Eastern Provinces, with its headquarters in Lusaka. In Southern Province (hereafter SP) the focus is the Community Sensitization and Mobilization Campaign (CSMC). Initiatives in this component include research and verification and the use of popular theatre to facilitate community participation to surface issues related to increasing girls' and other vulnerable children's enrolment and retention in primary school, as well as issues related to HIV/AIDS; recruitment and training of Zonal Community Facilitators (ZCFs); training of teachers and community leaders in life skills and issues relating to girls education and HIV/AIDS; development and implementation of zonal, community, and school action plans; and the provision of small grants based upon school- and community-generated proposals.

In Eastern Province (hereafter EP) the central thrust is on school health and nutrition interventions, including: conducting baseline and follow-up biomedical, anthropomorphic, and cognitive surveys of pupils; providing micronutrients and deworming pills to primary pupils, administered by teachers; training teachers in school health, nutrition, and life skills; sensitizing and mobilizing communities through popular theatre, district field teams, and public gatherings; and strengthening linkages between health centers and schools.

At the end of September 2002, the CHANGES programme passed the half-way mark in its initial three-year phase. Although there have been some challenges and difficulties, overall the programme has achieved its objectives to date and USAID, as a result of a recent education sector review and the development of its next five-year Country Strategic Plan, has committed to extending support to the CHANGES programme. In response to this, CHANGES is recruiting a consultant team to design an 18-month programme extension and, on that basis, to write a proposal for submission to USAID.

## **Rationale**

The CHANGES programme was originally intended to be a four and one-half year initiative. However, due to budgetary and timing issues the programme was redefined to be a three-year programme with the option of an additional 18 months during which the work being done under CHANGES will, as appropriate and feasible, be accelerated, expanded, and scaled-up.

On the SHN side, owing to the clear success of the component to date and the inherent appeal of the programme to pupils and parents, from the start there has been considerable demand for expanding the programme. In fact, plans are already underway to accelerate the programme through expanding it beyond the initially planned three districts in EP into two further districts (Lundazi and Mambwe), and the MOE is also undertaking expansion into several districts of Lusaka and Central Provinces, supported by the CHANGES programme. In all cases, the rate of expansion is 20 schools per district. In July 2002, a concept paper was written by Dr. Bradford Strickland (USAID/Washington) which outlined one scenario for accelerating the SHN programme during the remainder of the present three-year phase, and expanding it to all districts during the proposed extension (again, 20 schools/district) of Zambia which, at 72 total districts, would encompass 1,440 schools. While this is one possible approach to the extension, there are other alternatives that could be explored, and thus much work remains to be done to finalize the design, proposal, and illustrative budget for extension of the SHN component of CHANGES.

On the CSMC side, difficulties in determining the optimum scope of the component (in terms of numerical targets) and the best implementation modalities, have at times slowed progress. However, the refocusing of the programme, first in March 2002, and then further in August 2002, has strengthened the case for expansion and extension and has, in fact, defined the broad contours of one potential scenario for the extension. Presently, the full CSMC model is being implemented in 410 school catchment areas in nine of the 11 districts in SP, which represents approximately one-half of the total of 843 school catchment areas in the province. A possible approach to the extension for the CSMC, therefore, would be to cover all the remaining school catchment areas in the current nine districts, and then include all school catchment areas in the remaining two districts not covered at all so far. Were that to be done, all school catchment areas will have fully participated in the CSMC during the originally intended four and one-half year period. Even if this scenario were to be adopted for the extension, considerable work remains to be done in this case as well to finalize the design and incorporate it into the proposal with an accompanying budget.

Although the CHANGES programme is comprised of two major components—SHN and CSMC, with HIV/AIDS and the small grants mechanism as two cross-cutting themes—it is hoped that the extension will be designed in a way that brings about as much synergy and integration of the two main components as possible to overcome some of the fragmentation that has existed during the first phase of the programme.

Further, and importantly, all activities proposed for the CHANGES programme extension should directly relate to and reinforce the Main Activities of the three Sub-Programmes relevant to the CHANGES programme (Gender and Equity, HIV/AIDS, and SHN) as delineated in the MOE's "Strategic Plan 2003-2007." These are as follows:



### Gender and Equity (1.3.1)

- Develop and implement support systems for girls' and other vulnerable children's education. (1.3.1.1)
- Implement strategies to encourage more female teachers to serve in remote rural schools. (1.3.1.2)
- Sensitise communities on the importance of education, especially girls' education. (1.3.1.3)

### HIV/AIDS (1.3.2)

- Support the establishment of HIV/AIDS peer counseling groups in schools. (1.3.2.1)
- Develop and implement strategies for mitigating the impact of HIV/AIDS on teachers and other staff. (1.3.2.2)
- Sensitise schools and local communities on care, causes, and prevention of HIV/AIDS (1.3.2.3)

### School Health and Nutrition (SHN) (1.3.3)

- Re-introduce Agricultural Production Units. (1.3.3.1)
- Expand deworming and micro-nutrient supplementation in all schools. (1.3.3.2)
- Implement other interventions, including school feeding programmes, for pupils with nutrition supplementation where necessary. (1.3.3.3)

The aim is to integrate and align CHANGES extension activities as closely as possible with the main activities proposed by the MOE for the period 2003-2007.

### **Objectives to be Achieved**

The following objectives will guide the work of the CHANGES extension design/proposal writing team:

- Develop a work plan and schedule for carrying out the assignment.
- Review relevant documents, including all CHANGES quarterly reports, consultant reports, especially Dr. Bradford Strickland's SHN concept paper and Dr. Janet Robb's March CSMC consultancy trip report, and portions of the recently completed application for funds to the Schistosomiasis Control Initiative (SCI) that was written by the MOE, MOH, and CHANGES.
- Consult with key stakeholders in Lusaka, EP, and SP and make site visits to schools and communities to observe the work accomplished to date.
- Confer with other donors and agencies (e.g., JICA, World Bank, UNICEF) working in similar areas to determine potential synergies and linkages.
- Develop an overall design for the extension of the CHANGES programme (including, as appropriate, an acceleration of current activities in the 10 months preceding the extension) that includes both SHN and CSMC components.
- Plan and facilitate a one-day workshop for key stakeholders in which the draft proposal is presented, discussed, and feedback is received.

- Incorporate the comments and feedback received from key stakeholders (above) and finalize the extension proposal.
- Submit the proposal and budget to the CHANGES Senior Technical Advisor; the proposal should include: brief statement of the design of each programme component and how they interrelate, targets, indicators, deliverables, and monitoring and evaluation plan, implementation timeline, staffing plan, and an illustrative budget that demarcates MOE and CHANGES costs. The proposal should be accompanied by a “Results Framework” (in the USAID format), which includes an illustrative plan, milestones, and deliverables.

### **Illustrative Description of the Design and Proposal Writing Process**

The work will be accomplished during April and May 2003. The Senior Technical Advisor of the CHANGES programme and MOE Director of Planning and Information, both based in Lusaka, will be the main contact persons for the consultant team. The consultant team will be comprised of the following, with one of the Zambian consultants as Team Leader:

Zambian CSMC (Girls’ Education/Community Mobilization)  
 Consultant/Team Leader  
 Zambian SHN Consultant  
 Expatriate Consultant (Programme Design/SHN Specialist)

It is anticipated that the consultant team will complete its work in four weeks during 28 April through 24 May 2003, according to the following proposed schedule of activities:

Approx. Time Frame	Tasks and Deliverables	Persons Involved
6 days (28 April-3 May)	-In Lusaka, hold an initial meeting with the Director, Planning and Information (MOE), Senior Technical Advisor and USAID Education Advisor. -Read CHANGES documents. -Confer with MOE counterparts and other line ministry stakeholders in the Lusaka area. -At USAID, meet with GDO, SO2 (education) team, SO3 (health) team, and HIV/AIDS advisor. -Agree on the structure and format of the extension proposal. -Develop a work plan and schedule for the consultancy; finalize travel plans.	Consultant team and designated individuals
4 May (Sunday)	-Lusaka (or travel)	
5 days (5-9 May)	-Travel to EP (or SP) and conduct meetings with key stakeholders; make site visits. -Start developing SHN component design, staffing plan, and budget.	Consultant team; provincial, district, zonal, community, and school stakeholders.
10 May	-Work in Lusaka	Consultant team

11 May (Sun)	-Lusaka (or travel)	
5 days (12-16 May)	-Travel to SP (or EP) and conduct meetings with key stakeholders; make site visits. -Start developing CSMC component design and budget.	Consultant team; provincial, district, zonal, community, and school stakeholders.
17 May	-Work in Lusaka	Consultant team
18 May (Sun)	-Lusaka	
6 days (19-24 May)  Distribute draft proposal to key stakeholders by 20 May; presentation and discussion of draft proposal at workshop on 22 May; final version of proposal submitted on 24 May.	-In Lusaka, meet with other donors and organizations (eg, JICA, World Bank, UNICEF) to discuss potential synergies and linkages. -Meet with MOE/HQ counterparts and CHANGES staff for further input as required. -Complete draft proposal and distribute it to key stakeholders for feedback (see narrative for details). -Plan and facilitate a one-day workshop for key stakeholders in the Lusaka area to present draft proposal and obtain feedback. -Submit final proposal and Results Framework to CHANGES Senior Technical Advisor in Lusaka.	Consultant team and selected stakeholders.

Upon arrival in Lusaka, the consultant team will hold an initial meeting with the MOE Director Planning and Information, CHANGES Senior Technical Advisor, and USAID Education Advisor to become acquainted, to more clearly define the tasks and deliverables, and to agree on the structure and format of the extension proposal. The team will also pay a courtesy call on the USAID Mission Director at the earliest possible time. Also during these initial days, the consultant team will finish reading relevant programme documents (which they will have had in-hand prior to the start of the consultancy), meet individually or in small groups with key MOE/HQ counterparts and CHANGES staff, USAID staff (GDO, SO2 team, SO3 team, HIV/AIDS advisor) and other stakeholders as appropriate. Additionally, the design team will finalize their schedule and travel plans for the entire consultancy period.

The consultant design team will then spend the bulk of the next two weeks in the field in EP and SP. While in the field, the consultant team will meet with SHN and CSMC team members, dialogue with key stakeholders (e.g., provincial, district, and zonal ministry counterparts, rural health center staff, school heads and teachers, and community members), and make site visits as appropriate. Significantly, the consultant team should gain a clear understanding of realities on the ground so that the design that is developed for the extension is realistic and takes into account the challenges and constraints that are likely to appear during implementation.

Upon returning to Lusaka, the design team will meet with other donors and organizations that share similar interests and programming—for example JICA, World Bank, and UNICEF—to explore possible synergies and linkages that can be incorporated in the design of the

CHANGES extension. The completed (draft) extension design and proposal (including targets and indicators, implementation timeline, staffing plan, and budget) will then be distributed to key stakeholders (see list below) before a one-day workshop that will be held in the Lusaka area. During that workshop, to be facilitated by the design team, the consultants will present the draft extension proposal and receive comment and feedback from the stakeholders. Likely participants in the one-day workshop are:

Director, Planning and Information (MOE)  
Director, Human Resources and Administration (MOE) (former Equity and Gender Component Manager)  
Chief Inspector of Schools (MOE) (former SHN Component Manager)  
HIV/AIDS Component Manager (MOE)  
New Equity and Gender Component Manager (MOE)  
New SHN Component Manager (MOE)  
PEO Eastern Province  
PEO Southern Province  
MOH/CBOH Representative  
UNICEF Representative  
CARE International Small Grants Manager  
USAID Representatives  
Eastern Province Coordinator (CHANGES)  
Southern Province Coordinator (CHANGES)  
CHANGES Senior Technical Advisor  
Creative Associates International Representative, Washington, DC

The feedback that is obtained during the workshop will be incorporated into the proposal; the final proposal will then be submitted to the CHANGES Senior Technical Advisor who will distribute copies to the Extension Advisory Committee who will oversee obtaining final approval from the MOE and USAID. USAID will liaise with Creative Associates International to obtain their approval of the final proposal.

Office support will be provided in Lusaka by the CHANGES/Lusaka office and in the provinces by the CHANGES EP and SP field offices. Transport will be provided for work-related travel within and outside Lusaka. The consultants will provide their own laptop computers.

The dates of the consultant team's work are 28 April – 24 May 2003, which constitutes 24 paid working days (omitting Sundays). The consultants are encouraged, as much as possible, to travel on Saturdays and Sundays in order to maximize productivity during weekdays.

## **Deliverables**

1. Draft proposal and budget for the CHANGES extension. (This document will be distributed to key stakeholders early in the last week of the consultancy for comment during the one-day presentation and feedback workshop near the end of the consultancy. A copy of the draft proposal will be submitted to the CHANGES office in Lusaka for forwarding to the home office in Washington, DC for feedback.)

2. Plan and facilitate a one-day stakeholders workshop near the end of the consultancy in which the proposal is presented by the design team and feedback is obtained from the participants.
3. Final proposal—including strategies, linkages with other donors (as appropriate), targets, indicators, monitoring and evaluation plan, implementation timeline, staffing plan, and budget (distinguishing between MOE and CHANGES costs)—for the CHANGES extension, and an accompanying “Results Framework.” One hard copy and one soft copy of each will be submitted to the CHANGES Senior Technical Advisor.

The Senior Technical Advisor will then circulate copies of the final proposal to the Extension Advisory Committee who will forward the document to the MOE Senior Management Group and USAID for final approval. USAID will negotiate final approval of the proposal with its contractor, Creative Associates International in Washington, DC.

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